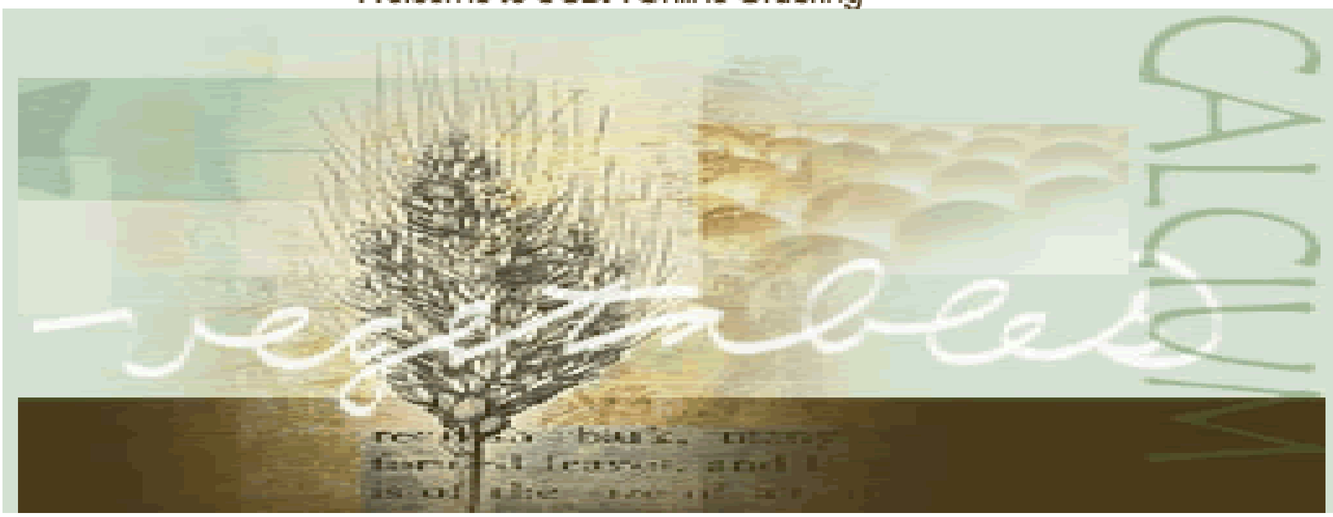
USDA Electronic Commodity Ordering System

Welcome to USDA Online Ordering



Electronic Commodity Ordering System (ECOS) Recipient Agency User Manual

United States Department of Agriculture

Prepared for:
Food and Nutrition Service
Food Distribution Division

August 2005

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REVISION HISTORY

Version Number	Revision Summary	Date
1.0	Initial Release for ECOS 3.4	September 2004
1.1	Updated requisitions for ECOS 3.8	April 2005
1.2	Updated for ECOS 3.9 • Updated Homepage section with new For Your Reference – “Delivery Years and Description” • Updated Appendix A with new codes	June 2005
1.3	Updated for ECOS 3.9.1 • Updated Org Admin, Sys Admin, User, and Read Only Role Available Options tables	August 2005

TABLE OF CONTENTS

I. WELCOME

A. Overview

The *ECOS Receiver Organization User Manual* was written for System Administrators, Organization Administrators, and users at the Receiver Organization. The Receiver Organization may be processors, warehouses, and distributors and includes different levels of suborganizations, such as plants. The following topics are addressed in this manual: the Login IDs and Passwords, Homepage, Administration Pages, My Account, and Reports.

B. Document Version Control

This manual is the second release (Version 1.1) of this document under the Electronic Commodity Ordering System (ECOS). Documents created and maintained by the EDS ECOS team are subject to Configuration Management control and any changes are communicated to the appropriate stakeholders.

C. Contact Us for Help

For questions on ECOS functions or information in this manual, call 1-703-305-2914 Monday through Friday from 8 a.m. to 5 p.m. Eastern Standard Time or email the ECOS Help Desk at any time at ECOS-HelpDesk@fns.usda.gov.

II. LOGIN IDS AND PASSWORDS

A. Overview

The Login page is the first page displayed when you access the ECOS web site (as shown in *Figure II–1: Login Page*). It is located at the following address on the World Wide Web:

https://www.usdaservices.eds-gov.com/

From this page, you can log in to ECOS, browse the commodity catalog, or access several informational resources that are available through links on this page.

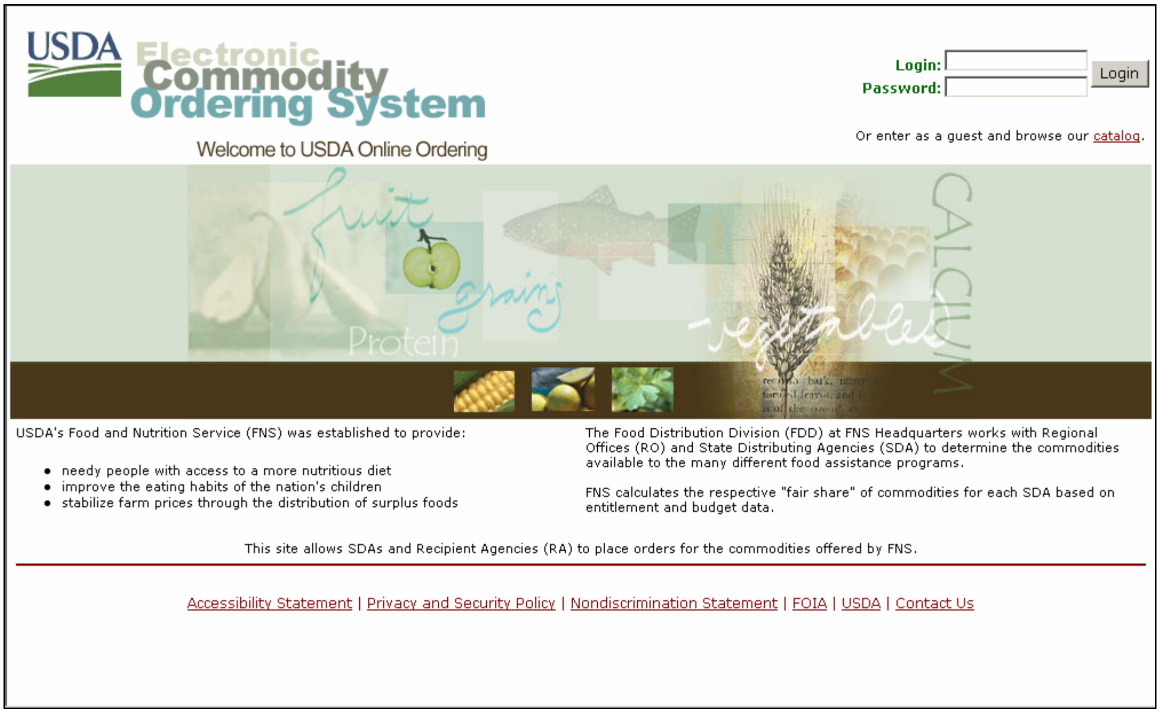


Figure II-1: Login Page

B. Logging In

Log in to ECOS by entering your login ID and your password, then click the **Login** button. If the login ID or password is incorrect, the system will return an error message. Login IDs and passwords are assigned to you by your System Administrator and must follow established conventions, described below.

- Login IDs must be 8 to 20 characters in length
- Passwords must have the following characteristics:
  - Be 8-30 characters in length
  - Contain at least one uppercase letter
  - Contain at least one lowercase letter
  - Contain at least one digit (0-9)

Passwords must be reset every 90 days. ECOS will prompt you when it is time to change your password.

C. Links

The Footer Links at the bottom of the page (refer to *Figure II-1: Login Page*) provide referral and reference information to the user. These links provide the following access:

- **Accessibility Statement** – access to the USDA's Accessibility Statement
- **Privacy and Security Policy** – access to the USDA's Privacy and Security Policy
- **Nondiscrimination Statement** – access to the USDA's Nondiscrimination Statement
- **FOIA** – access to the USDA's Freedom of Information Act web site
- **USDA** – access to the USDA web site
- **Contact Us** – access to the ECOS Support Team via email

III. HOMEPAGE

A. Overview

The Homepage is the first page displayed after you log into ECOS (as shown in *Figure III–1: Homepage*). From this page, you can access other functional areas on the web site and informational resources. Your role determines your access to the functional areas (as defined in *Section III.B Definition of Roles*).

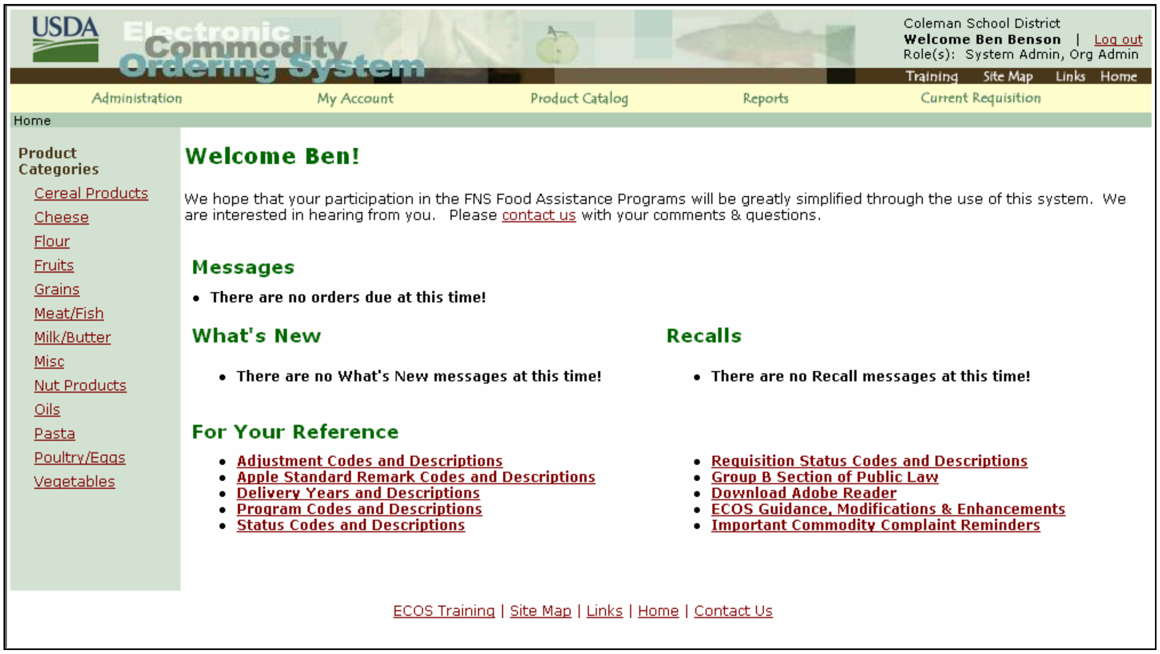


Figure III–1: Homepage

B. Definition of Roles

1. Org Admin

The main function of the Org Admin role is to establish and maintain RA information and create and process requisitions. The available options for each area of functionality for an Org Admin are listed in *Figure III–2: Org Admin Role Available Options*.

Function	Available Options
Administration	• View/Edit Recipient Agency Profile • Create/View/Edit/Delete Broadcast Messages
My Account	• Approval Process • Modify Requisitions • View New Requisitions • Complete Saved Requisitions • Correct Rejected Requisitions • Update My Profile • View My Organization • Submit Complaints • Complete Saved Complaints • View Complaints
Product Catalog	• View Catalog • Place Requisitions
Reports	• Requisition Status Report • Requisition by PCIMS Report • Value of Commodities Received Report • Requisition Ent/Bonus Status Detail Report • Requisition Ent/Bonus Summary Report • Security Listing Report • Commodity File Report • Complaint Summary Report
Current Requisition	• Complete Requisitions

Figure III–2: Org Admin Role Available Options

2. Sys Admin

The main function of the Sys Admin role is to establish and maintain other user profiles. The available options for each area of functionality for a Sys Admin are listed in *Figure III–3: Sys Admin Role Available Options*. “Administration” and “Reports” are the only functions available to a Sys Admin user.

Function	Available Options
Administration	• Create/View/Edit/Delete Users
Reports	• Requisition Status Report • Requisition by PCIMS Report • Value of Commodities Received Report • Requisition Ent/Bonus Status Detail Report • Requisition Ent/Bonus Summary Report • Security Listing Report • Commodity File Report • Complaint Summary Report

Figure III–3: Sys Admin Role Available Options

3. User

The main function of the User role is to create and process requisitions. The available options for each area of functionality for a user are listed in *Figure III–4: User Role Available Options*.

Function	Available Options
My Account	• Correct Rejected Requisitions • View New Requisitions • Compete Saved Requisitions • Update My Profile • View My Organization
Product Catalog	• View Catalog • Place Requisitions
Reports	• Requisition Status Report • Requisition by PCIMS Report • Value of Commodities Received Report • Requisition Ent/Bonus Status Detail Report • Requisition Ent/Bonus Summary Report • Commodity File Report • Complaint Summary Report
Current Requisition	• Process Requisitions

Figure III–4: User Role Available Options

4. Read Only

The main function of the Read Only role is to monitor requisitions through the reports. The Read Only role cannot create requisitions. The available options for each area of functionality for a Read Only user are listed in *Figure III–5: Read Only Role Available Options*. "My Account," "Product Catalog," and "Reports" are the only options available to a Read Only user.

Function	Available Options
My Account	• View Rejected Requisitions • Update My Profile • View My Organization
Product Catalog	• View Catalog
Reports	• Requisition Status Report • Requisition by PCIMS Report • Value of Commodities Received Report • Requisition Ent/Bonus Status Detail Report • Requisition Ent/Bonus Summary Report • Commodity File Report • Complaint Summary Report

Figure III–5: Read Only Role Available Options

C. Homepage Design

The Homepage (as shown in *Figure III–6: ECOS Homepage*) resembles many of the other pages on this web site, and has the following features:

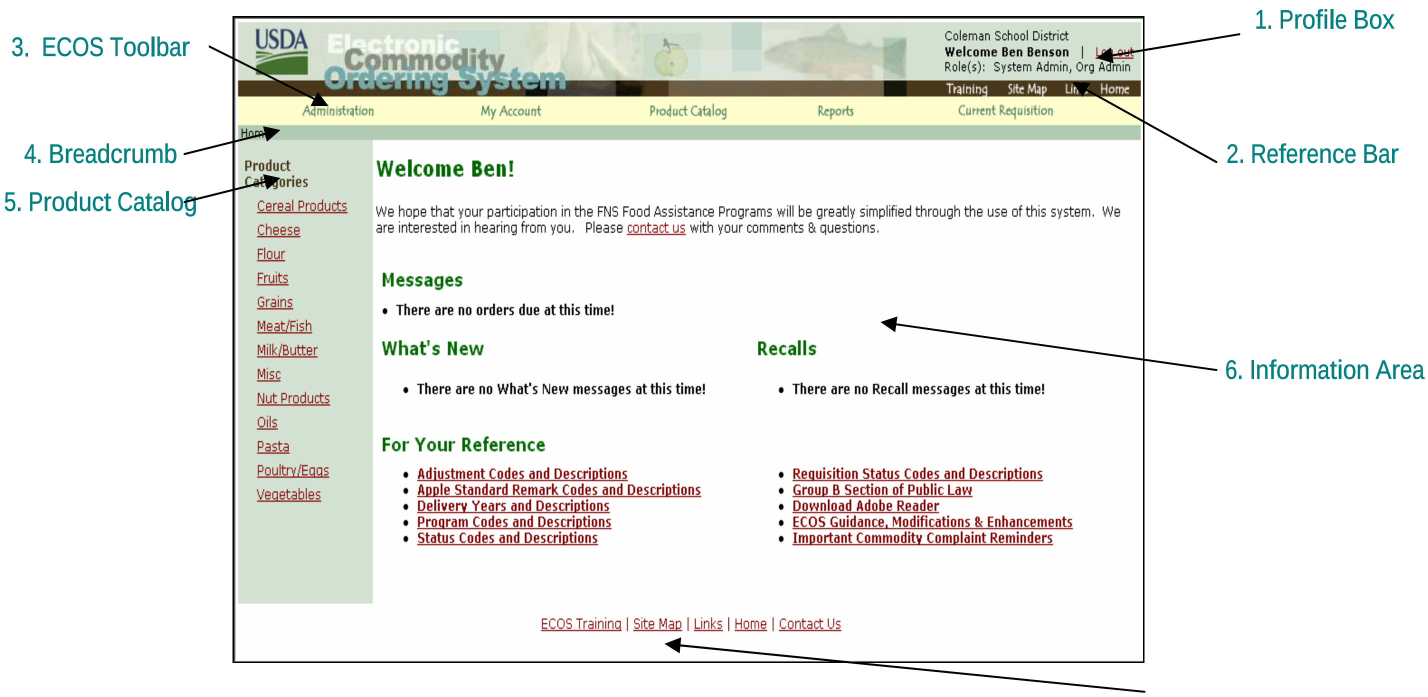


Figure III–6: ECOS Homepage

1. Profile Box (Log Out Link)

The Profile Box contains the name of your organization, your access role(s), and a **Log out** link to exit ECOS. As you navigate through ECOS, you will find that the information in this box does not change.

2. Reference Bar

There are four menu options on the Reference Bar: **Training**, **Site Map**, **Links**, and **Home**. These menu options are nearly identical to those in the Footer Links at the bottom of the page.

- **Training**—Allows you to access the User Manual.
- **Site Map**—Allows you to access the Site Map page, which contains a layout of the web site. The page is organized into columns, with each column dedicated to a separate functional area in ECOS. The column headings correlate with the functional areas in the ECOS Toolbar. Under each column heading is a list of links available in each functional area. Clicking any of these links takes you to that particular page on the web site.

  The Site Map is organized and populated according to the access rights aligned with your user role. For instance, if you do not have an Administrator role, the Administration column would not be displayed on your site map.

- **Links**—Allows you to access customized links to outside web sites (refer to the create new link instructions in *Section VII.C Create Links*).
- **Home**—Returns you to the Homepage.

3. ECOS Toolbar

The ECOS Toolbar contains the menu options for the various functional areas to which you have access, based on your role (refer to *Figure III–2: Org Admin Role Available Options*).

4. Breadcrumb

The Breadcrumb is a navigational tool used to track your path as you move through ECOS. It is located directly below the ECOS Toolbar. The Breadcrumb is updated continually as you click from page to page and navigate through the system.

5. Product Catalog

The Homepage contains a list of Product Categories. Clicking any of these categories allows you to view the list of commodities that are currently available in ECOS and, depending on your role, place requisitions (refer to *Section VI.B.1 View Product Catalog*).

6. Information Area

The Information Area on the Homepage begins with a personal greeting and includes several other sections for Recalls and Reference links. These sections are described below.

- **Welcome**—Contains a cordial greeting and a link for contacting the SA. This link appears in red, is underlined, and reads "contact us."
- **Messages**—Displays reminders about approaching deadlines for commodity orders. **Note**: If the list of reminders exceeds the available space on the Homepage, you will need to use the **Next** link at the end of the list of reminders to access the next group of reminders.
- **What's New**—This section should be reviewed whenever you log into ECOS. As an RA, you can receive broadcast messages from the USDA, your SA, or your own agency. When one of these organizations sends out a broadcast message, it will be displayed in this section.
- **Recalls**—This section should be reviewed whenever you log into ECOS. If the USDA has any commodity recall information that needs to be disseminated to its organizations, this tool can help accomplish this task. If there are no recall messages, the system provides a message stating that there are no messages to display.
- **For Your Reference**—Provides a list of links which provide access to several informational resources available as you navigate through ECOS:
  - Adjustment Codes and Descriptions
  - Apple Standard Remark Codes and Descriptions
  - Delivery Years and Descriptions

- Program Codes and Descriptions
- Status Codes and Descriptions
- Requisition Status Codes and Descriptions
- Group B Section of Public Law
- Download Adobe Reader
- ECOS Guidance, Modifications, & Enhancements
- Important Commodity Complaint Reminders

For more details on these links, refer to *Appendix A: Homepage Reference Links*.

7. Footer Links/Contact Us

The Footer Links are located just below the Information Area. They are identical to the menu options located in the Reference Bar, with the addition of the **Contact Us** link. For more details, refer to the Reference Bar and Information Area sections of this manual, in *Sections III.C.2 Reference Bar and III.C.6 Information Area,* respectively.

D. Changing Your Windows Display Setup

When viewing and editing some of the ECOS pages, you must scroll up and down and left to right to view the entire page(s). If you do not scroll completely to the right, you may miss some screen functionality that is needed to complete your transaction. Some of the scrolling can be eliminated if your screen resolution is changed to meet or exceed the recommended ECOS display setting (1024 by 768 pixels or higher). If you cannot change your setting, you will need to contact your Information Technology Department.

Instructions for changing your display setting are provided below:

1. Click the **Start** button (at the bottom left hand side of the Windows screen).
2. Click or highlight the Settings option.
3. Click the Control Panel option.
4. Double-click the Display icon.
5. Click the Settings tab.
6. In the Screen Resolution area, click and hold the arrow and drag it to the recommended setting of 1024 by 768 pixels or higher.
7. Click the **OK** button. You will receive a message (similar to "You have resized your desktop. Do you want to keep these settings?").
8. View the display settings and determine whether they are "OK."
9. Click the **YES** button (if you do not do this, your system will default back to the original display settings).

IV. USER MAINTENANCE

A. Overview

The User Maintenance section shows you how to maintain your personal profile and other users' information. All users are able to maintain their personal profiles. However, only Sys Admins can maintain another user's access for the system. This includes changing user passwords and contact information such as name, address, telephone numbers, and e-mail addresses. The Sys Admin can also delete users. This section addresses the following functions: Creating Users, Creating New Administrators, Viewing/Editing Users, and Deleting Users.

B. Editing My Profile (Org Admin, User, and Read Only)

To edit your personal profile, click the **My Account** menu option on the ECOS toolbar. This takes you to the My Account page (as shown in *Figure IV–1: My Account*). From this page, click the **My Profile** link.

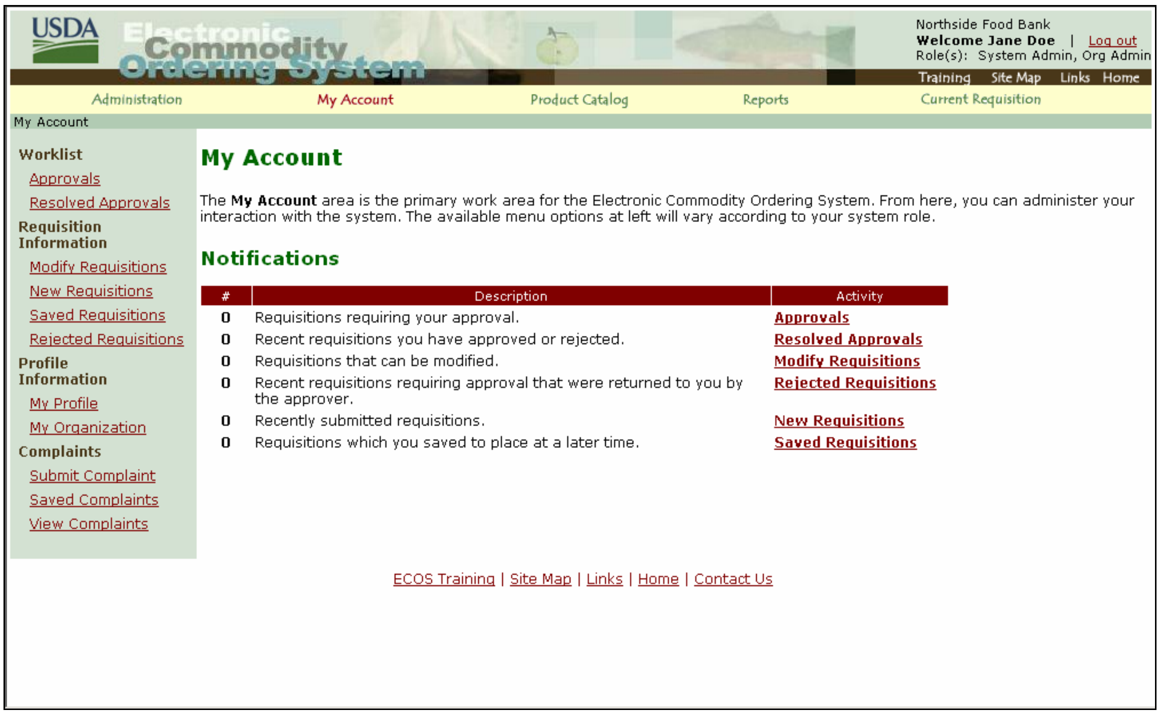


Figure IV–1: My Account

This takes you to the View My Profile page (as shown in *Figure IV–2: View My Profile*). From this page, you can edit your personal information and change your password for the system.

Figure IV–2: View My Profile

1. Edit Personal Information

To edit your personal information, click the **Edit** link under the Contact Information section on the View My Profile page. This takes you to the Edit My Profile page (as shown in *Figure IV–3: Edit My Profile).* When you have completed making your changes, click the **Save** button. This takes you back to the View My Profile page.

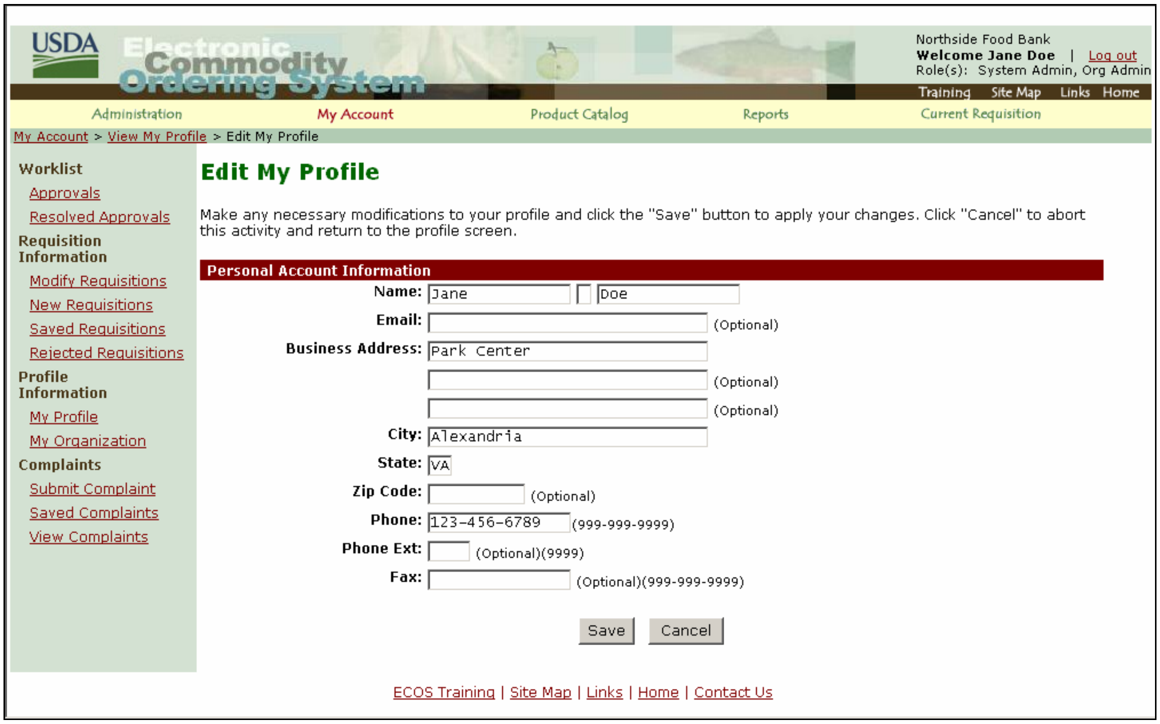


Figure IV–3: Edit My Profile

If you do *not* wish to edit your profile after clicking the **Edit** link, click the **Cancel** button and you will be returned to the View My Profile page.

2. Change Your Password

To change your password for the system, click the **Change password** link on the View My Profile page (refer to *Figure IV–2: View My Profile*). This takes you to the Change My Password page (as shown in *Figure IV–4: Change My Password).* Type your old password in the Old password field, and then type a new password in the New password field. Retype the new password in the Confirm password field, then click the **Save** button. If your passwords do not match, the system will prompt you to reenter your passwords.

Note: If you are a Sys Admin, you can only change your password through the Administration page (refer to *Section IV.D.2 Change Another User's Password*) and you will be required to change your password again, immediately after.

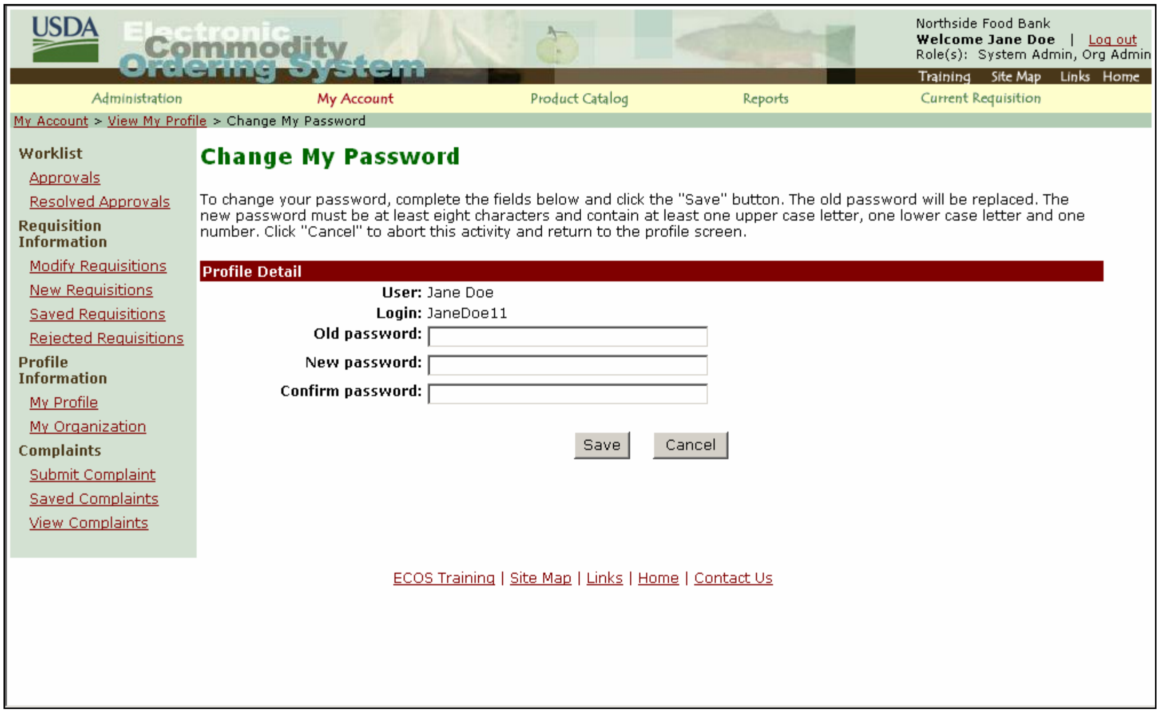


Figure IV–4: Change My Password

If you do *not* wish to change your password after clicking the **Change Password** link, click the **Cancel** button and you will be returned to the View My Profile page.

C. Creating Users (Sys Admin)

To create new users, click the Administration menu option on the ECOS Toolbar. This takes you to the main Administration page (as shown in *Figure IV–5: Administration*).

Note: As a Sys Admin, your Administration page only displays **View/Edit Users**, **Create Users**, and **Delete Users** links.

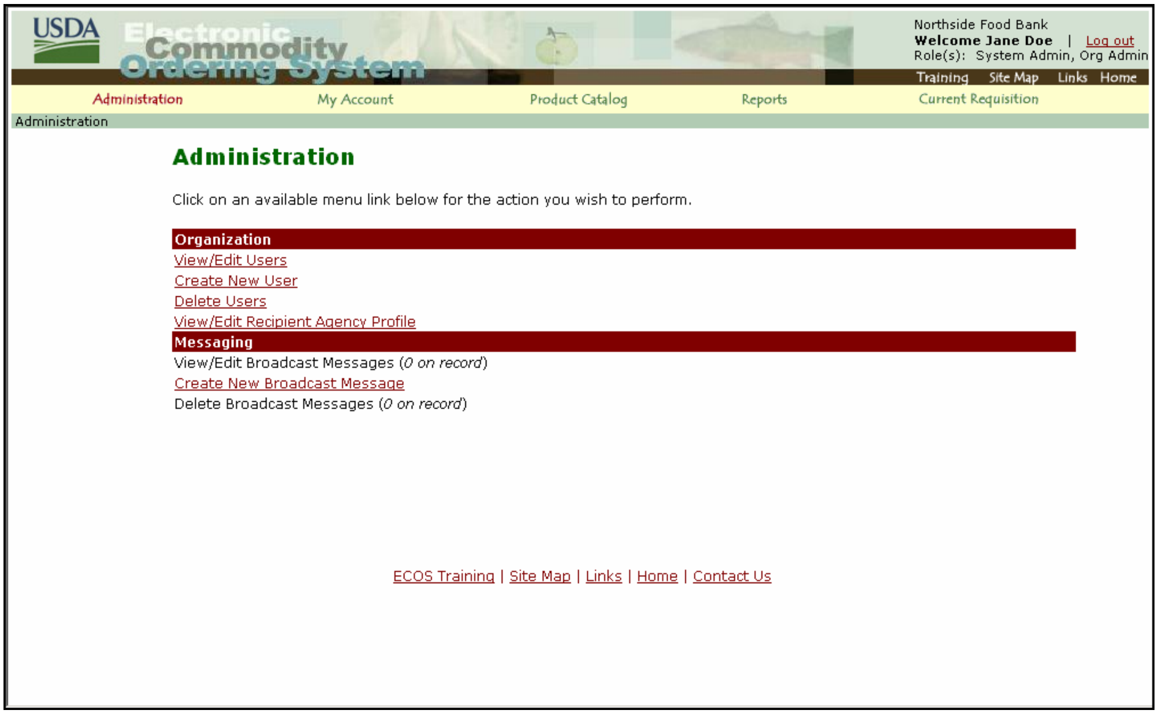


Figure IV–5: Administration

From this page, click the **Create New User** link. This takes you to the Create New User page (as shown in *Figure IV–6: Create New User*). After entering the required information, you will need to select at least one of four roles to be assigned to the user by clicking the selection box next to the appropriate role (refer to *Section III.B Definition of Roles*). Every RA should have at least one administrator. When creating users, it is important to remember that Read Only cannot be combined with any other role.

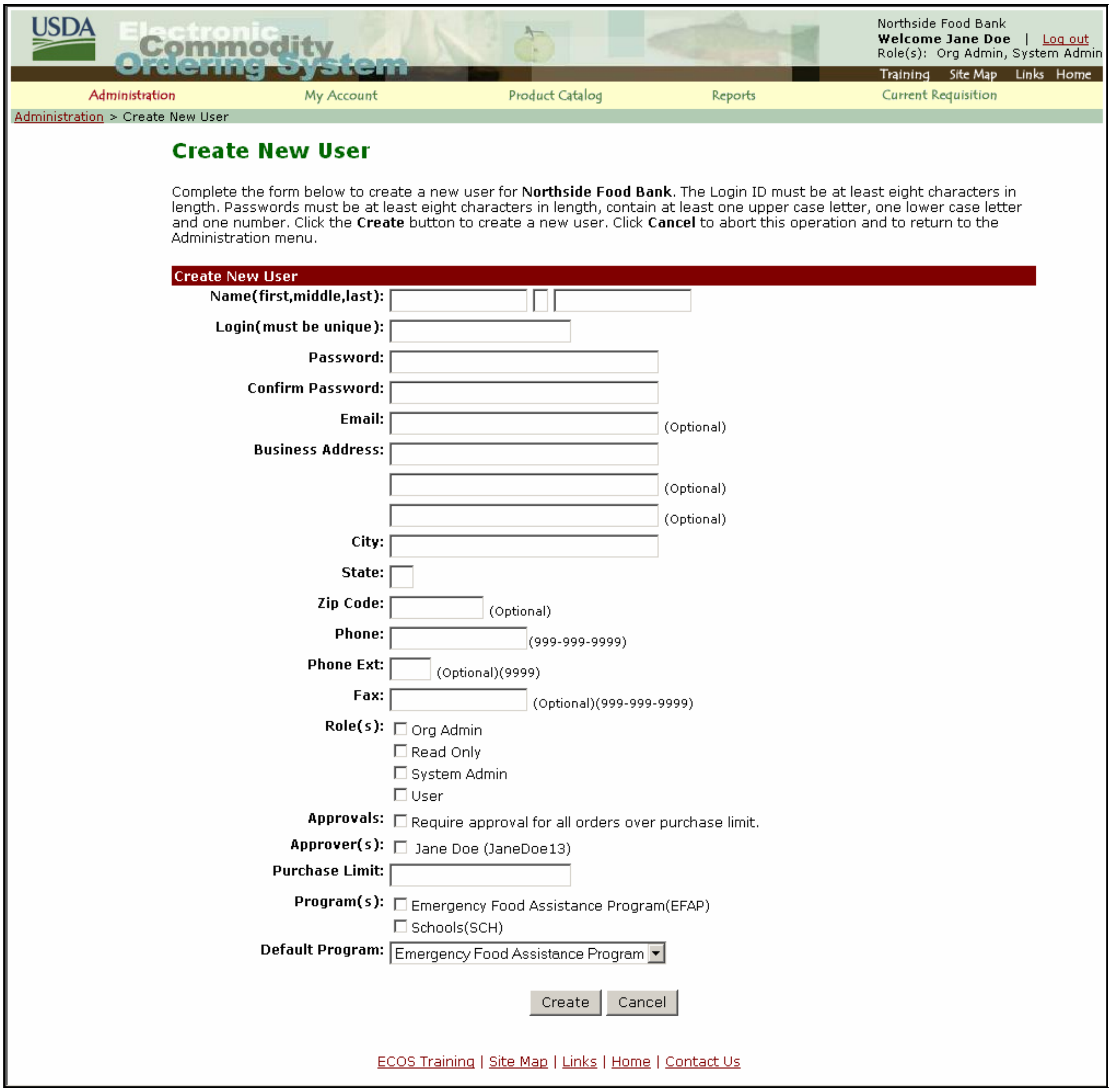


Figure IV–6: Create New User

During user creation, you can assign an approver for this user. An approver is an individual who reviews requisitions before they are sent to the SA. To assign an approver, click the selection box next to Approvals and Approver(s). You can also establish a purchase limit for this user, with requisitions over this set amount required to go to the approver for review. For information on the approval process, refer to *Section VI.D Requisition Approval Process*.

Select the programs this user will be completing requisitions for by clicking the selection box next to the appropriate program(s). Then assign one of the selected programs as the default program by highlighting the program name in the drop-down list box. This default will automatically be saved when creating requisitions. When finished, click the **Save** button.

If you do *not* wish to create a new user after clicking on the **Create New User** link, click the **Cancel** button and you will be returned to the Administration page.

D. Viewing/Editing Users (Sys Admin)

To modify another user's personal information, click the Administration menu option on the ECOS Toolbar. This takes you to the Administration page (refer to *Figure IV–5: Administration)*. From this page, click the **View/Edit Users** link. This takes you to the View/Edit Users page (as shown in *Figure IV–7: View/Edit Users*). This page lists all the users for your organization.

Note: As a Sys Admin, your Administration page only displays View/Edit Users, Create Users, and Delete Users links.

Figure IV–7: View/Edit Users

If you do *not* wish to view/edit users after clicking the **View/Edit Users** link, click the **Back** button and you will be returned to the Administration page.

To view/edit a user, click the user's name link under the User Name (login) bar. This takes you to the View User Profile page (as shown in *Figure IV–8: View User Profile*), where you can edit user profile, change passwords, and edit authorizations.

Figure IV–8: View User Profile

1. Edit Another User's Profile Information

You can edit another user's profile on the View User Profile page. To edit user information, click the **Edit** link in the User Profile Detail area. This takes you to the Edit User Profile page (as shown in *Figure IV–9: Edit User Profile*), where changes can be made to all fields. When you have completed making your changes, click the **Save** button.

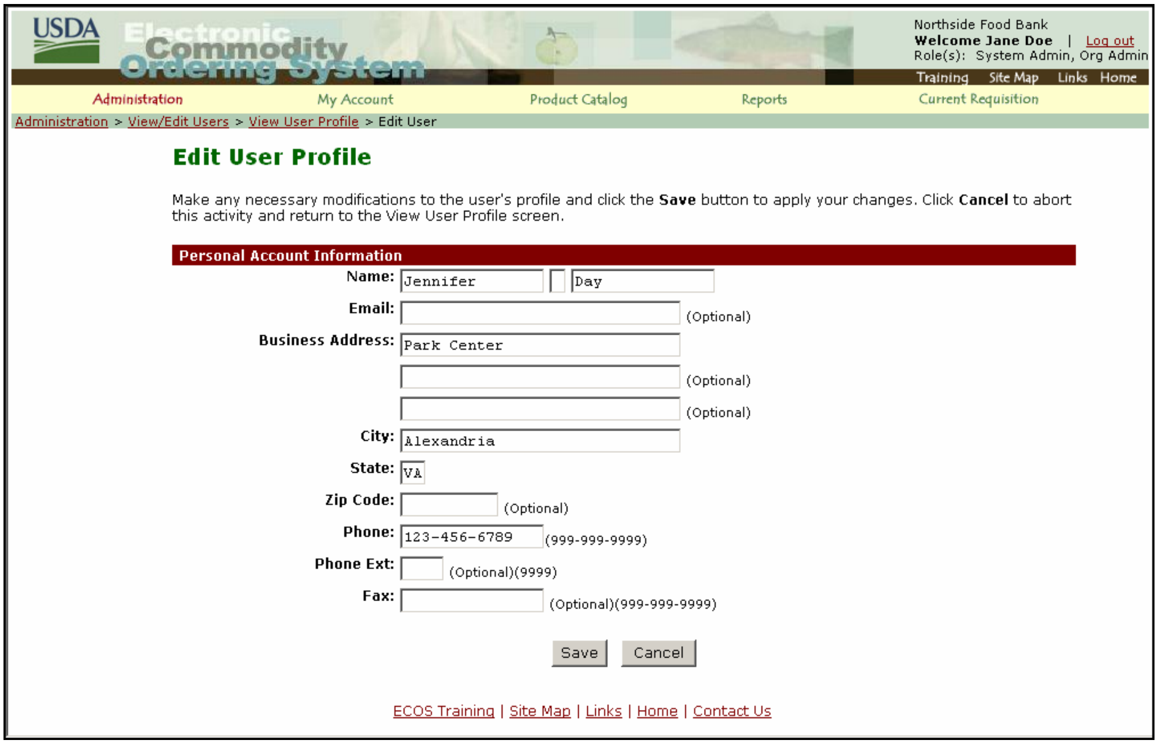


Figure IV–9: Edit User Profile

If you do *not* wish to edit the user profile after clicking the **Edit** link, click the **Cancel** button and you will be returned to the View User Profile page.

2. Change Another User's Password

To change another user's password, click the **Change password** link on the User Profile page. This takes you to the Change User Password page (as shown in *Figure IV–10: Change User Password*). Type a new password in the New Password field and then type the same password in the Confirm Password field. When finished, click the **Save** button. If your passwords do not match, the system will prompt you to reenter your passwords.

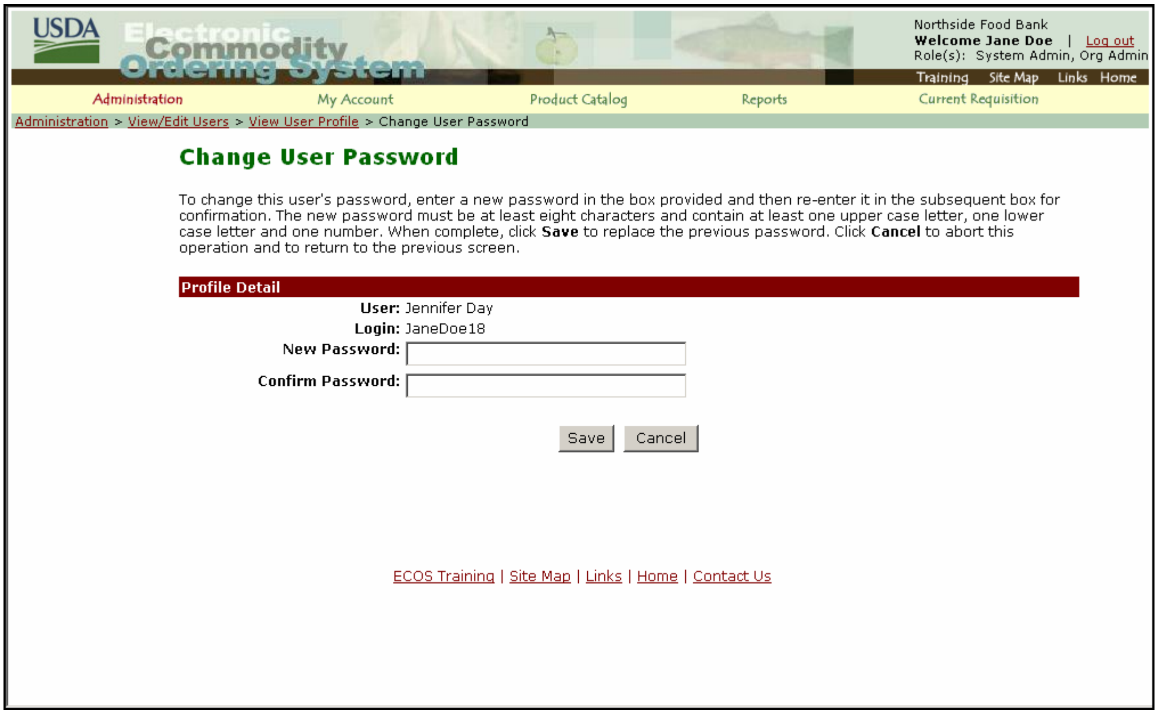


Figure IV–10: Change User Password

If you do *not* wish to change the user's password after clicking the **Change password** link, click the **Cancel** button and you will be returned to the View User Profile page.

3. Edit Another User's Authorizations

To change another user's authorizations, click the **Edit** link in the Authorizations area on the User Profile page. This takes you to the Edit Authorizations page (as shown in *Figure IV–11: Edit Authorizations*). From this page, you can select or deselect roles, establish or remove the approval restriction, assign or unassign a program, and change the default program.

Figure IV–11: Edit Authorizations

E. Deleting Users (Sys Admin)

To delete users, click the Administration menu option on the ECOS Toolbar. This takes you to the main Administration page (refer to *Figure IV–5: Administration*). On this page, click the **Delete Users** link. This takes you to the Delete User Profile(s) page (as shown in *Figure IV–12: Delete User Profile(s)*).

Figure IV–12: Delete User Profile(s)

If you do *not* wish to delete a user after clicking the **Delete Users** link, click the **Cancel** button and you will be returned to the Administration page.

Note: As a Sys Admin, your Administration page only displays **View/Edit Users**, **Create Users**, and **Delete Users** links.

To delete a user, click the selection box next to the user's name. After making your selection(s), click the **Delete** button. This takes you to the Confirm Delete Users page (as shown in *Figure IV–13: Confirm Delete Users*). Click the **OK** button to delete the user. After the user is deleted, you will automatically be returned to the Administration page.

Figure IV–13: Confirm Delete Users

If you do *not* wish to delete a user after clicking the **Delete** button, click the **Cancel** button and you will be returned to the Administration page.

F. Creating New Administrators (Org Admin)

To create new administrators, click the Administration menu option on the ECOS Toolbar. This takes you to the main Administration page (refer to *Figure IV–5: Administration).* This is another way to create Org Admin and Sys Admin users. On this page, click the **View/Edit Recipient Agency Profile** link. This takes you to the View RA Profile page (as shown in *Figure IV–14: View RA Profile).*

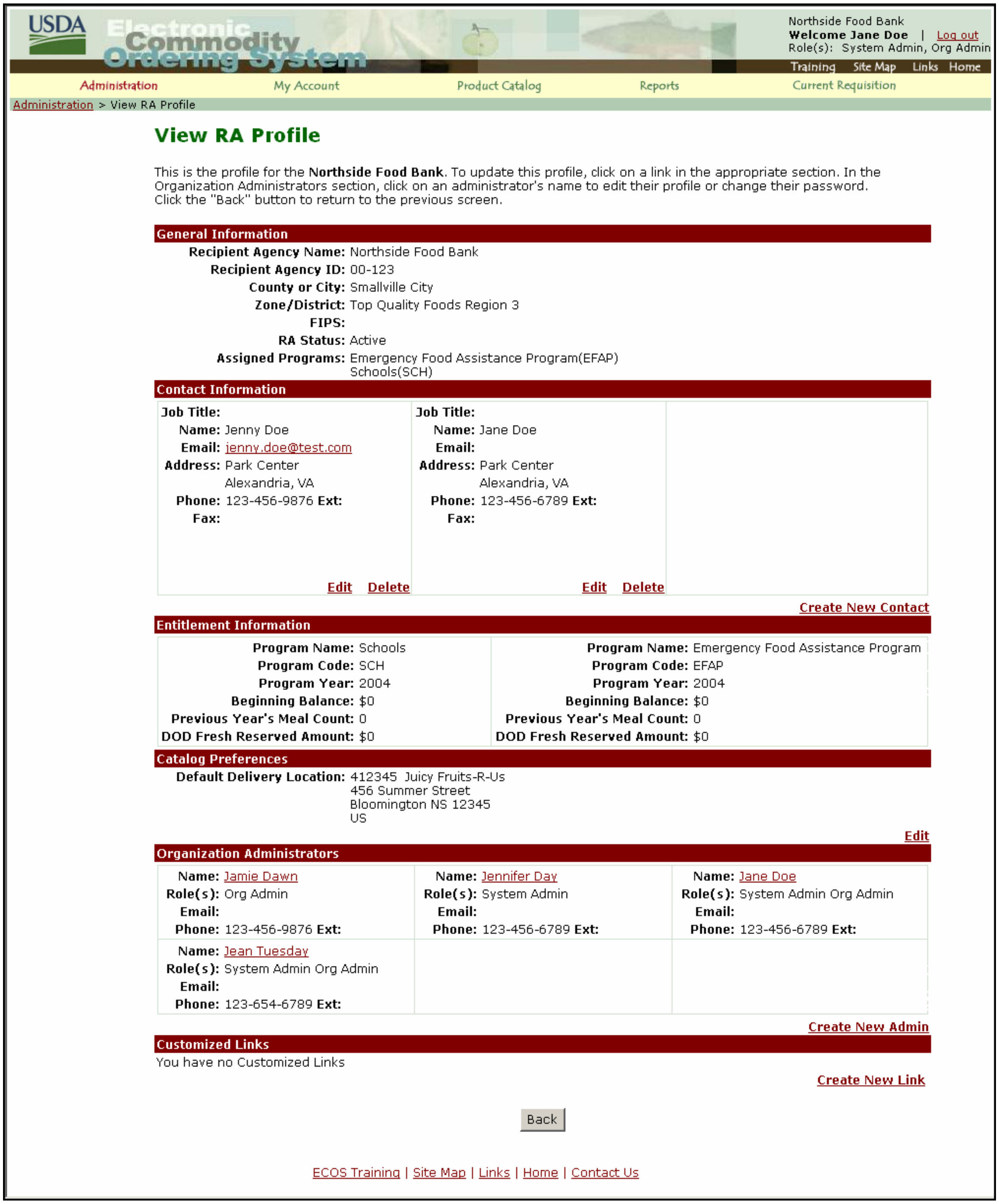


Figure IV–14: View RA Profile

On the View RA Profile page, click the **<u>Create New Admin</u>** link under the Organization Administrators section. This takes you to the Create New RA Admin page (as shown in *Figure IV–15: Create New RA Admin*). This page contains several optional fields. Complete all the required fields and click the **Create** button. When using the **<u>Create New Admin</u>** link on the View RA Profile page, only an Org Admin/Sys Admin user can be created. These roles are automatically selected when the Create New RA Admin

screen displays. **Note**: At the top of the page, there are enforced restrictions you need to follow when creating a login ID and password.

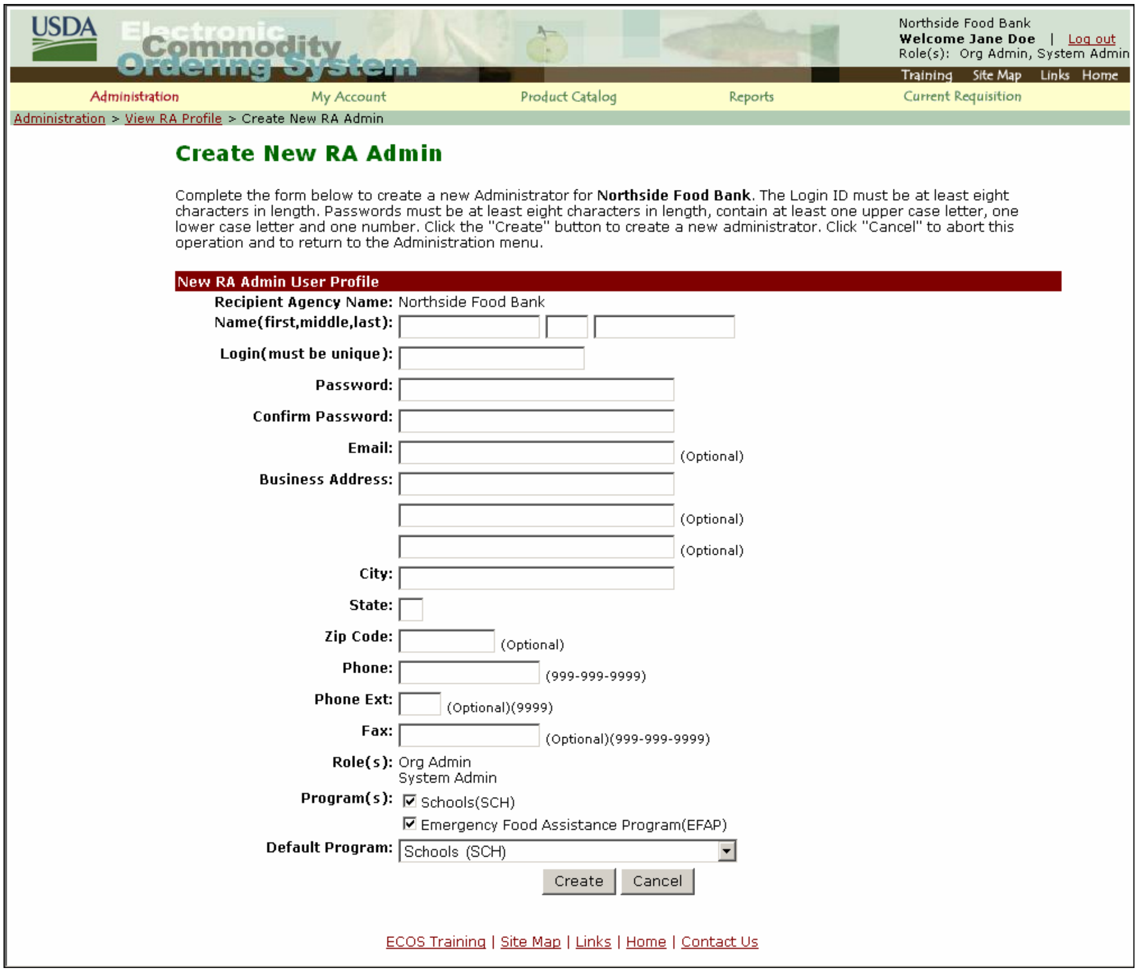


Figure IV–15: Create New RA Admin

If you do *not* wish to create an administrator after clicking on the **<u>Create New Admin</u>** link, click the **Cancel** button and you will be returned to the View RA Profile page.

V. ORGANIZATION MAINTENANCE

A. Overview

The Organization Maintenance section shows where information for the entire organization, such as Entitlement, Contacts, Delivery Locations, and Programs, can be viewed by all users. However, only Org Admins can create, edit, or delete certain information, including contacts and catalog preferences.

B. Editing Recipient Agency Profile (Org Admin)

When you click the **View/Edit Recipient Agency Profile** link on the main Administration page, you are taken to the View RA Profile page (as shown in *Figure V–1: View RA Profile).* This page contains information about your organization such as name, type, contacts, entitlement information, catalog preferences, administrators, and any defined links.

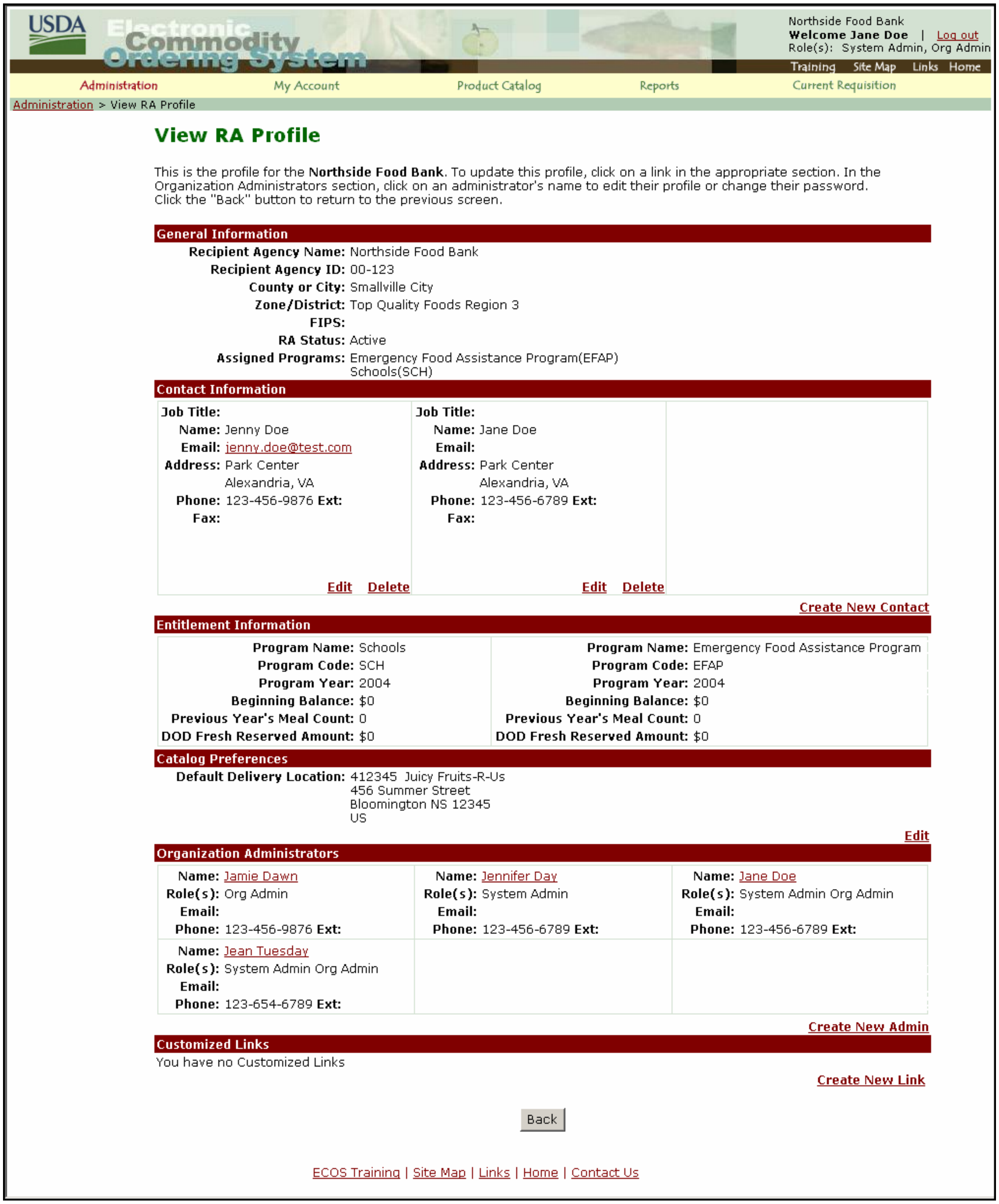


Figure V–1: View RA Profile

This page is divided into six sections: General Information, Contact Information, Entitlement Information, Catalog Preferences, Organization Administrators, and Customized Links. These sections are described below.

- **General Information**—The information displayed in this section was completed by your SA when your organization was created. It is specific to your RA and can only be changed at the SA level.

- **Contact Information—**The information in this section is general in nature, such as name, title, phone numbers, e-mail address, so forth Only Org Admins can create contacts for your organization. Although you can designate anyone you wish as a contact, any contacts created can be viewed by Org Admins, Users, and Read Only users in your organization. Refer to *Sections V.B.1 Create New Contacts*, *V.B.2 Edit Contacts*, *and V.B.3 Delete Contacts* for instructions on where and how you can create, edit, and delete contacts.

- **Entitlement Information—**The information displayed in this section was completed by your SA when your organization was created. The information is specific to your RA and can only be changed or deleted at the state level. There are two main factors in this section that comprise the two dollar values that are shown. They are Beginning Balance (or Entitlement) and DOD Fresh Reserved Amount.

  – **Entitlement—**To view your organization's Entitlement dollars, click My Account on the ECOS Toolbar. Click the **My Organization** link and you are taken to the View My Organization Profile page. The Entitlement Information area of the page displays the beginning entitlement balances by program year for any programs your agency administers. The entitlement beginning balance is based on meals served by your agency the prior year, and these meals are displays as the Previous Year's Meal Count within this same area. The beginning entitlement balance will also be shown on the Requisition Ent/Bonus Status Detail and Summary Reports.

  – **DOD Fresh—**The Department of Defense (DOD) Fresh Program allows state and RAs to set aside entitlement dollars for the direct purchase of fresh fruits and vegetables from the DOD. If your SA has elected to participate in this program, it will enter a value that will automatically be deducted from your agency's entitlement. To view your organization's DOD Fresh dollars, click My Account on the ECOS Toolbar. When you click the **My Organization** link, you are taken to the View My Organization Profile page. In the Entitlement Information area of the page, this amount displays as the DOD Fresh Reserved Amount and is by program and program year.

- **Catalog Preferences—**The only information displayed in this section is your default delivery location. This information was established by your SA when your organization was created and is used when creating requisitions. This default will automatically be used for your requisitions. Only Org Admins can edit this information. Refer to *Section V.B.4 Edit Catalog Preferences* for instructions on where and how you can change these defaults.

- **Organization Administrators—**This section displays all the administrators for your organization, including their role(s), e-mail address, and telephone number. Each organization should have at least one administrator. Refer to *Section IV.F Creating New Administrators* for instructions on where and how to create administrators.

- **Customized Links**—This section displays links to other web sites defined by your organization and/or by your SA. While Customized Links can only be created by Org Admins, they can be used by all users. Refer to *Sections VII.C Create Links*, *VII.D Edit Links*, *and VII.E Delete Links* to create, edit, and delete links, respectively.

To return to the Administration page, click the **Back** button.

From the View RA Profile page (refer to *Figure V–1: View RA Profile*), you can perform the following functions:

1. Create New Contacts

You can create, edit, or delete contacts in ECOS. To create new contacts, click the **Create New Contact** link. This takes you to the Create New RA Contact page (as shown in *Figure V–2: Create New RA Contact).*

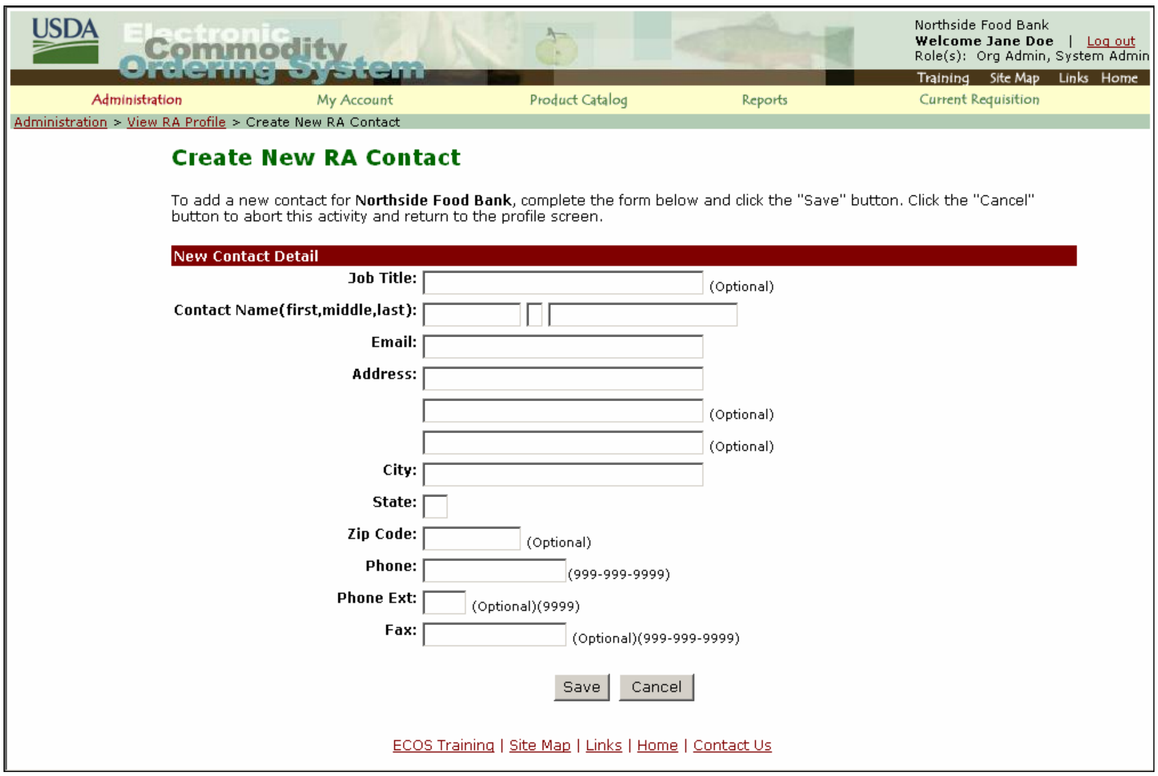


Figure V–2: Create New RA Contact

Note: All fields not marked as optional are mandatory. Complete the appropriate information and click the **Save** button.

If you do *not* wish to create a new contact after clicking on the **Create New Contact** link, click the **Cancel** button and you will be returned to the View RA Profile page. **Note**: A contact does not require an ECOS ID and password.

2. Edit Contacts

To edit an existing contact, click the **Edit** link on the View RA Profile page. This takes you to the Edit RA Contact page (as shown in *Figure V–3: Edit RA Contact).*

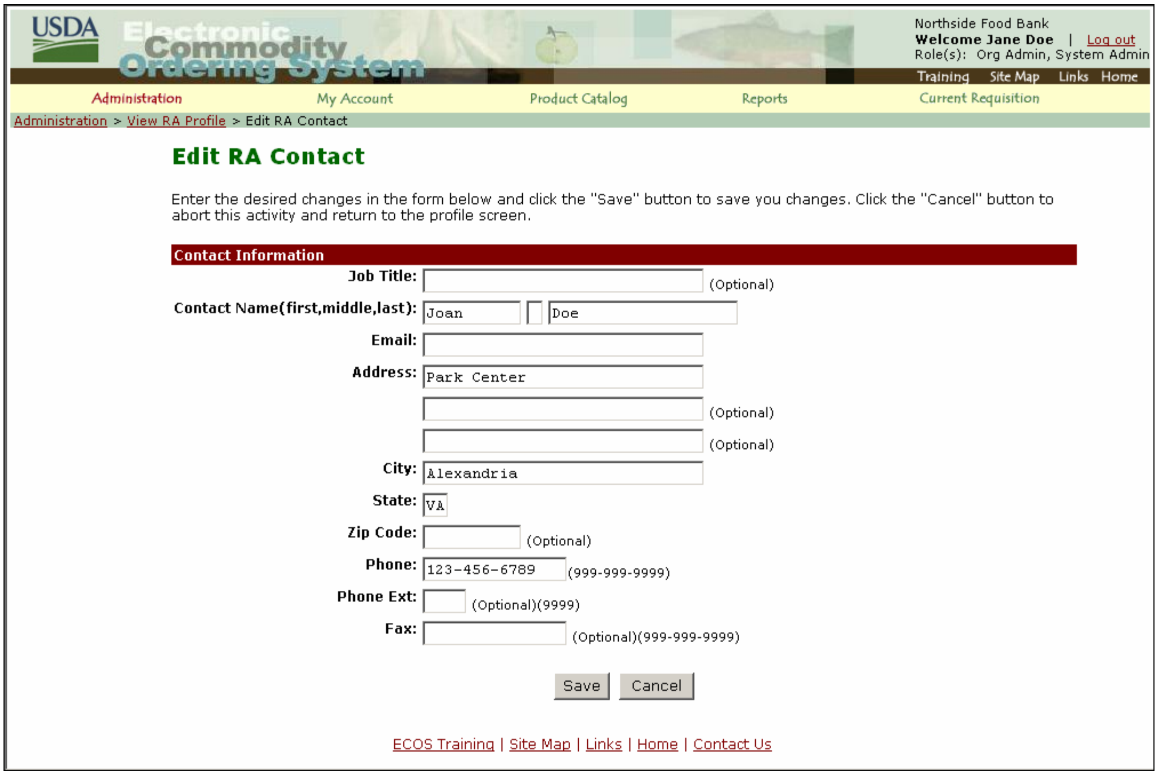


Figure V–3: Edit RA Contact

After making any necessary changes, click the **Save** button. You will automatically be returned to the View RA Profile page. If you do *not* wish to edit an existing contact after clicking on the **Edit** link, click the **Cancel** button and you will be returned to the View RA Profile page.

3. Delete Contacts

To delete an existing contact, click the **Delete** link on the View RA Profile page. This takes you to the Delete RA Contact page (as shown in *Figure V–4: Delete RA Contact).*

Figure V–4: Delete RA Contact

Clicking the **Delete** button deletes the contact, and automatically returns you to the View RA Profile page. If you do *not* wish to delete an existing contact after clicking on the **Delete** link, click the **Cancel** button and you will be returned to the View RA Profile page.

4. Edit Catalog Preferences

Catalog Preferences are your organization's default delivery location. This delivery location is automatically selected for requisitions created for this organization.

To change the default delivery location for your requisitions, click the **Edit** link. This takes you to the Edit RA Catalog Preferences page (as shown in *Figure V–5: Edit RA Catalog Preferences).*

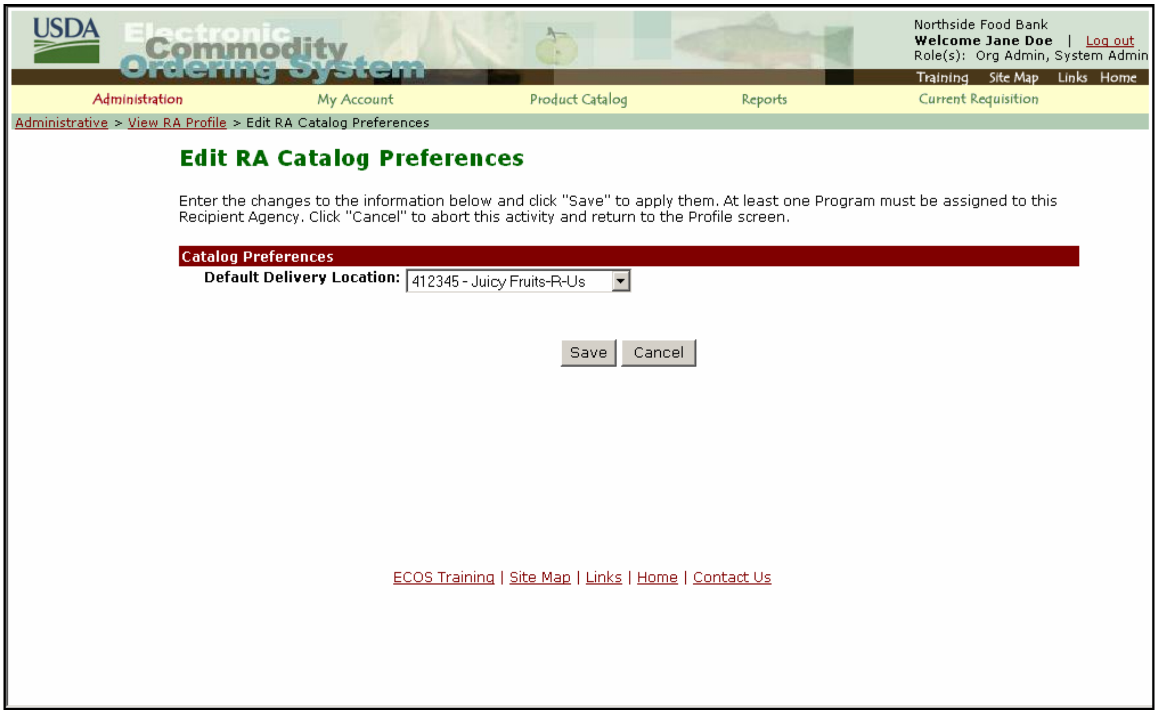


Figure V–5: Edit RA Catalog Preferences

The Default Delivery Location field is a drop-down box that lists all active delivery locations available to you. You can select another location from the drop-down box by highlighting the new location. After completing desired changes, click the **Save** button. You will automatically be returned to the View RA Profile page.

C. View My Organization

My Organization is where the organization profile information can be viewed by Org Admins, Users, and Read Only users. When you click the **My Organization** link on the My Account page, you are taken to the View My Organization Profile page. On this page, all information is read only.

VI. REQUISITIONS

A. Overview

Requisitions are "requests" for commodity products made available by the USDA in support of various agricultural markets. ECOS is not a completely demand driven system, because USDA has a two-fold mission: **Meet customer needs while providing agricultural support.** It is important to understand that requisitions may not be ordered and purchased exactly as requested for the following reasons:

- SAs must create full truckload quantities to submit an order to USDA. This may result in RAs' quantities being increased, decreased, changed to a different delivery period, or declined altogether.
- In addition to RAs' needs, USDA must support various agricultural markets. If RA requests do not match agricultural support needs, USDA may ask states to change their orders to support specific markets.
- Often, market conditions (weather, prices, so forth) affect USDA purchases, and orders may be changed to other delivery periods or deleted.

This section explains how requisitions are created and submitted to your SA for processing. It also describes the approval processes, including how to approve or reject requisitions, and other functions of ECOS related to the processing and monitoring of requisitions.

B. Creating Requisitions (Org Admin and User)

Creating requisitions is one of the primary functions available in ECOS. However, it can only be done by users who have an Org Admin or User role. To check your current role in ECOS, refer to the Profile Box in the upper right-hand corner of the page after you log in. Your role(s) are listed on the third line.

There are two types of requisitions: "processed" and "non-processed." Commodities are either shipped to a processor (processed); or to a state, RA maintained, or contracted warehouse (non-processed). The procedures for creating these requisitions vary slightly. To create a requisition, you must first access the Product Catalog.

1. View Product Catalog

The Product Catalog is available through the Product Catalog links on both the Homepage and Product Catalog page. Both pages contain a list of Product Categories. To view the Product Catalog from the Homepage, click on any of the **commodity group** links under the Product Categories on the left side of the page (as shown in *Figure VI–1: Homepage).*

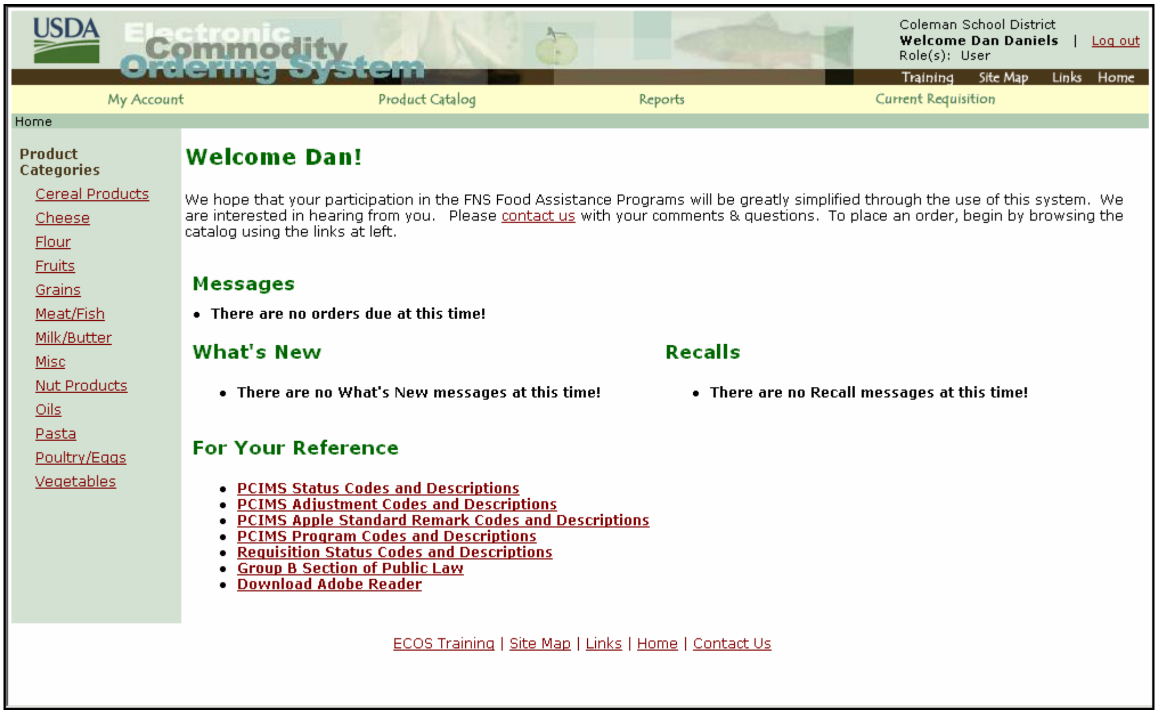


Figure VI-1: Homepage

To view the Product Catalog from the Product Catalog page, click the **Product Catalog** menu options on the ECOS toolbar and then click any of the **commodity group** links under the Product Categories on the left side of the page (as shown in *Figure VI–2: Product Catalog*).

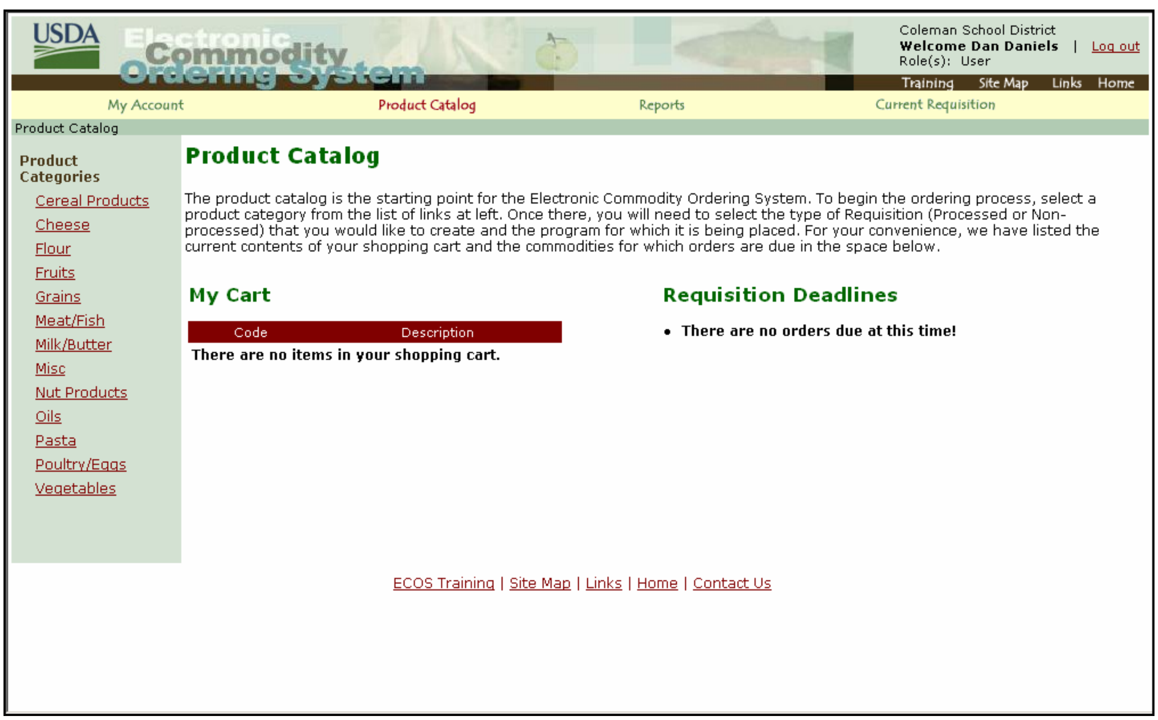


Figure VI-2: Product Catalog

The Product Category page displays (as shown in *Figure VI–3: Product Category: Fruits).*

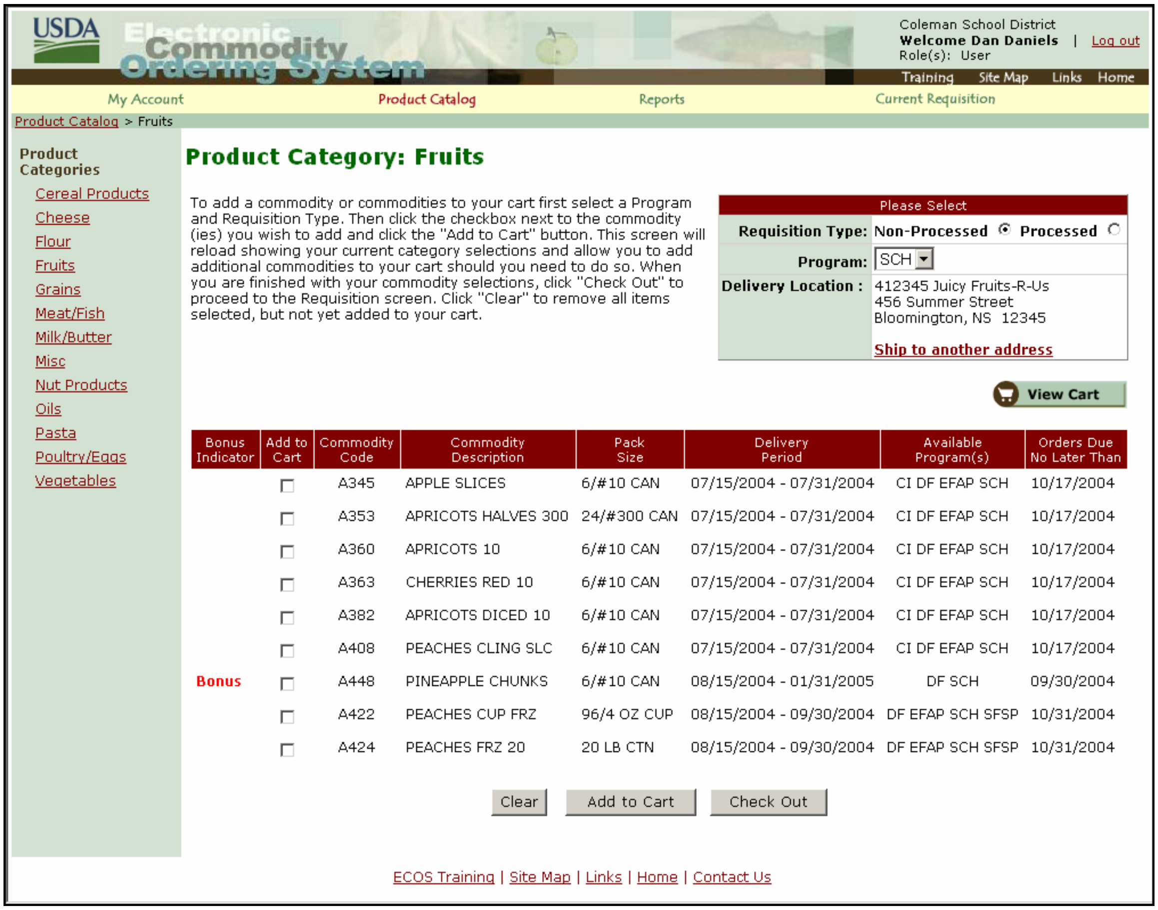


Figure VI-3: Product Category: Fruits

The Product Categories fields/columns are defined below:

- **Bonus Indicator**—Only populated when a commodity is a bonus commodity; otherwise, the field remains blank. Bonus commodities do not count against programs entitlement.
- **Add to Cart—**Used to select the commodity when adding commodities to your “shopping cart.”
- **Commodity Code—**Populated with the four-character commodity code that is associated with the particular commodity being offered.
- **Commodity Description—**An established short title for the commodity offering.
- **Pack Size—**Indicates how the commodity is packaged.
- **Delivery Period—**Provides the date range in which the commodity is offered for delivery to the state maintained or contracted warehouse or to a processor.

- **Available Program(s)—**Lists all programs for which this commodity is available.
- **Orders Due No Later Than—**Indicates when the commodity offering expires.

This information is subject to change as new commodity offerings are made available and old ones expire. If a category does not currently offer any commodities, a message will display. Once you have accessed the Product Catalog, you can begin creating your requisition.

2. Create a Non-Processed Requisition

A non-processed requisition is a request for commodity products to be sent directly to a state maintained or contracted warehouse or, if you are a large agency, directly to your own warehouse. SAs have determined how commodities will be distributed and can provide information about the commodity delivery location.

To place a non-processed requisition, select a Product Category from either the Homepage or Product Catalog page; the Product Catalog displays for that category. The Fruits category (as shown in *Figure VI–4: Product Category – Fruits [Non-Processed]*) is used as an example.

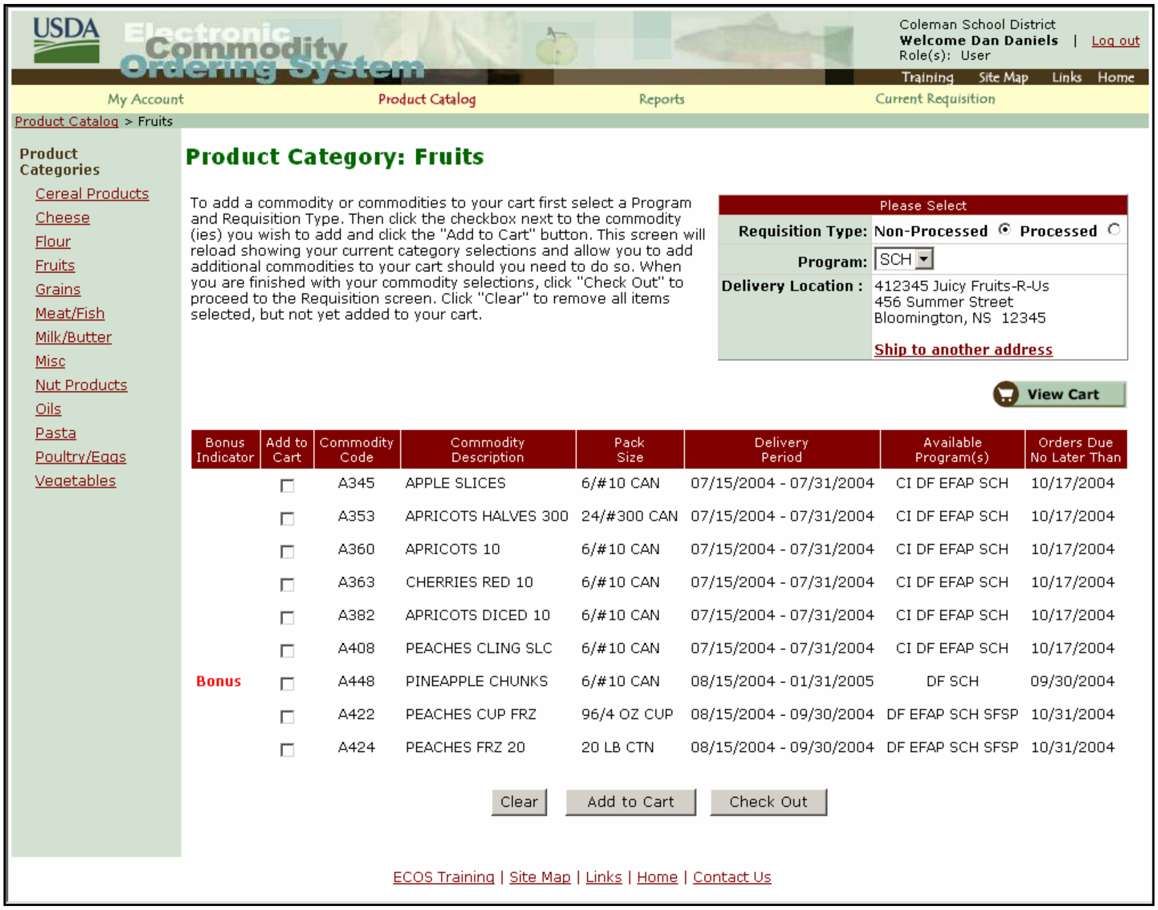


Figure VI-4: Product Category – Fruits (Non-Processed)

The first step in creating a non-processed requisition is to indicate the Requisition Type, Program, and Delivery Location. These fields are located in the "Please Select" box in the upper right-hand corner of the Information Area of the Product Category page (refer to *Figure VI–4: Product Category – Fruits [Non-Processed]*). Since the default selection for Requisition Type is "Non-Processed," you will only need to verify that the "Non-Processed" field is selected. Next, select the appropriate program in the Program drop-down list box. Only those programs you administer will show. When you change the program, the catalog will be refreshed with the commodity(ies) applicable to that program.

Check your Delivery Location to make sure it is correct for the commodities you will be requesting. If it is incorrect, change it by clicking the **Ship to another address** link. A list of delivery locations displays. Select the correct delivery location from the list, scroll to the bottom, and click the **Continue** button.

After selecting the Requisition Type, Program, and Delivery Location, you can begin filling your shopping cart with commodities. To do this, scroll through the list of commodity offerings and determine which commodities you would like to add to your requisition. Click the selection box under the Add to Cart column for each commodity you wish to add to your cart. After selecting the desired

commodity(ies), click the **Add to Cart** button at the bottom of the page. If the list of commodities exceeds the length of the page, you may need to scroll down to the bottom of the page to find the **Add to Cart** button.

The **Clear** button allows you to remove any commodity selections you have made that have not been added to your cart. The **Clear** button will have no effect on any commodity selections that you have already added to your cart; those commodities will remain. You can remove a commodity from your cart after you go through the check-out process.

After you click the **Add to Cart** button, the Requisition Type, Program, and Delivery Location fields in the "Select Items" box become permanent (as shown in *Figure VI–5: Add to Cart – Fruits [Non-Processed]*). At this point, you can no longer make changes to these fields on this page.

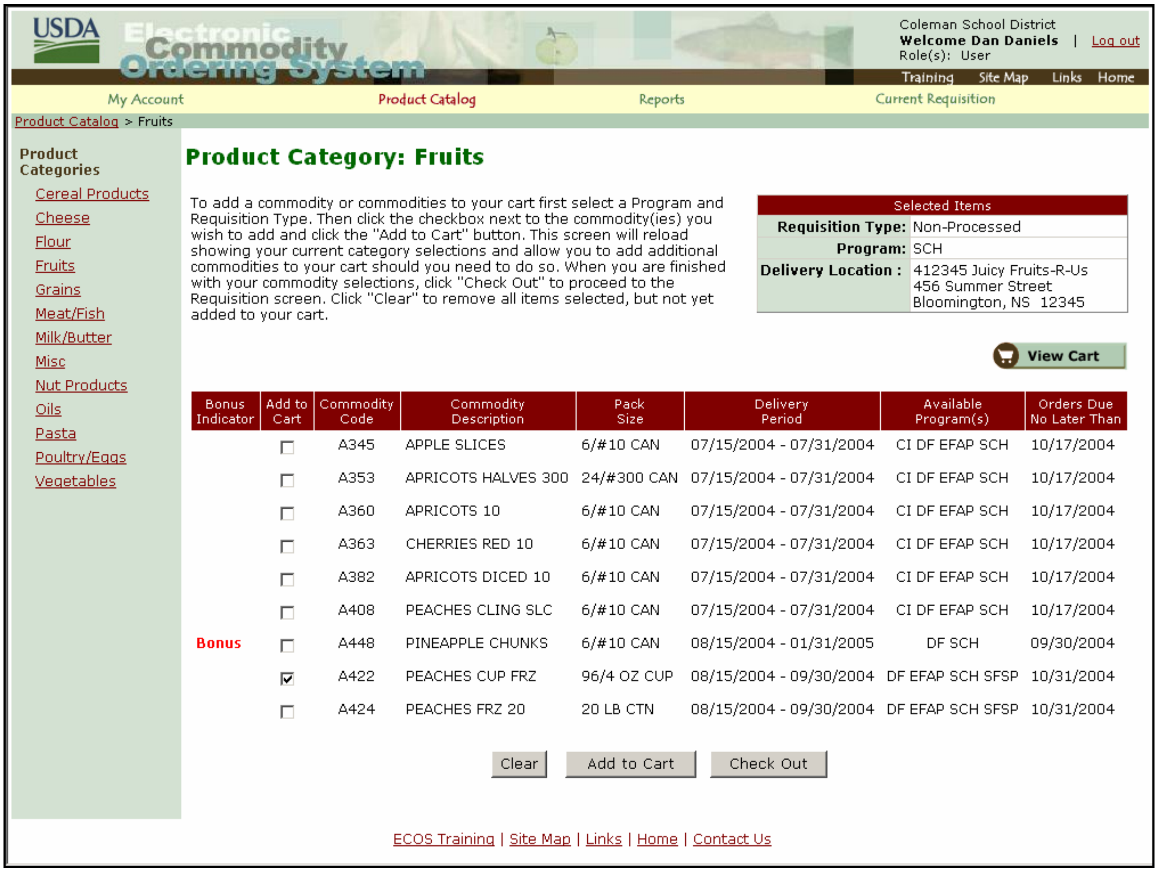


Figure VI-5: Add to Cart – Fruits (Non-Processed)

After adding commodities to your cart for a particular Product Category, you can click any other Product Category in the Product Categories and continue adding commodities to your cart for this requisition, as long as they are destined for the same location.

You can check the contents of your shopping cart at any time by clicking the **View Cart** button. A small window opens and a list of the commodities in your shopping cart displays (as shown in *Figure VI–6: View Cart [Non-Processed]*).

Figure VI-6: View Cart (Non-Processed)

When you finish adding commodities to your requisition, you are ready to check out. Do this by scrolling to the bottom of the page and clicking the **Check Out** button (refer to *Figure VI–5: Add to Cart – Fruits [Non-Processed])*. The Current Requisition page displays (as shown in *Figure VI–7: Current Requisition [Non-Processed]*).

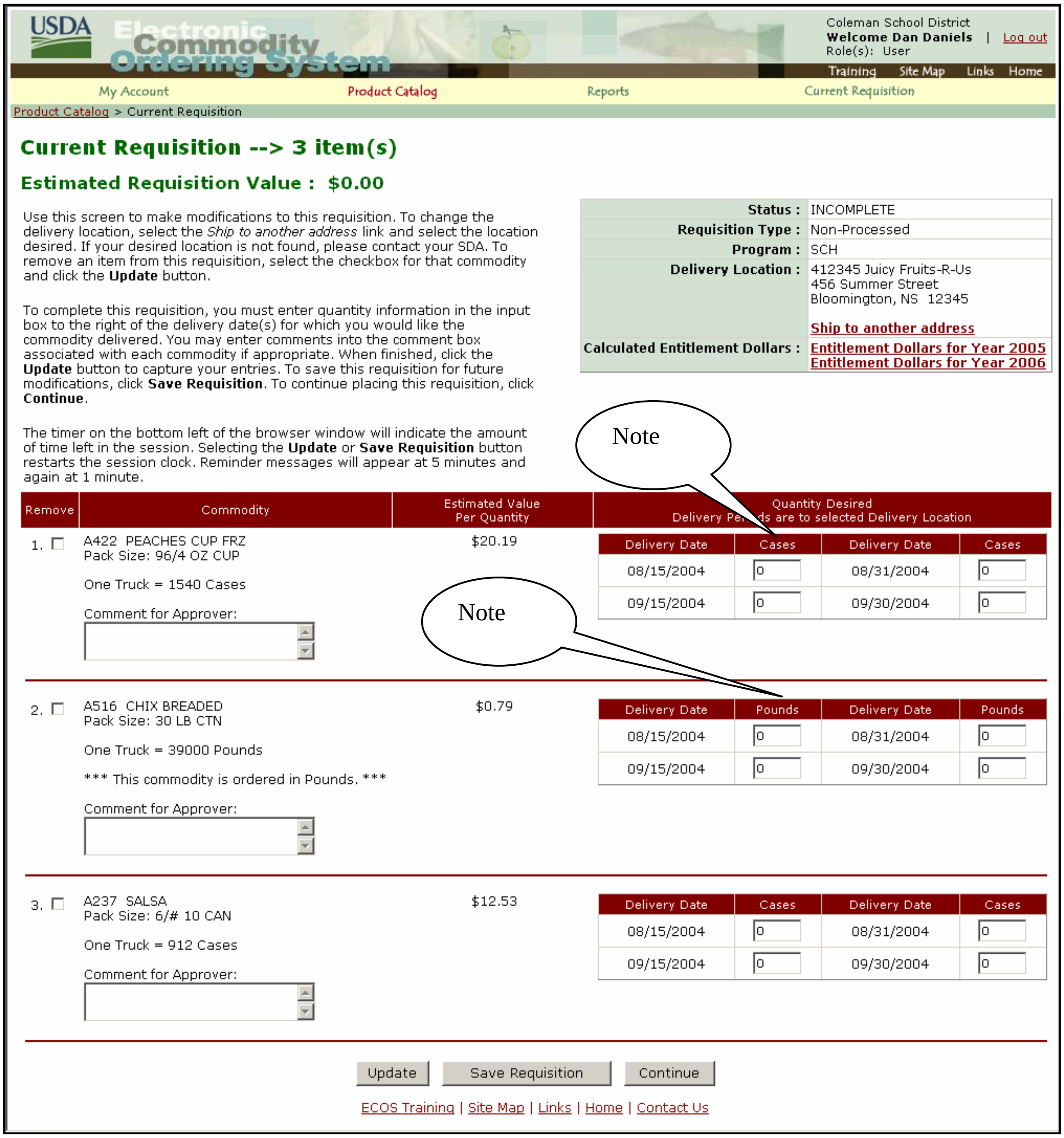


Figure VI-7: Current Requisition (Non-Processed)

When the Current Requisition page displays, check your Delivery Location to make sure it is correct for the commodities you are requesting. To do this, locate the Delivery Location field in the box in the top right-hand corner of the page. If the delivery location listed in this field is incorrect, you will need to change it by clicking the **Ship to another address** link. A list of delivery locations displays. Select the correct delivery location from the list and scroll to the bottom and click the **Continue** button. Contact your SA if the address that your commodities are to be shipped to is not in the drop-down list.

All the commodities that you added to your shopping cart are now listed on the Current Requisition page. A description of the column headings is provided below:

- **Remove**—Allows you to remove a commodity from your requisition by clicking the selection box (a check will display in the box) and clicking the **Update** button at the bottom of your list of commodities. That commodity is then removed from your requisition.
- **Commodity—**The information listed here includes the commodity code, commodity name, pack size, and full truck quantity.
- **Estimated Value Per Quantity—**The current estimated purchase cost of one unit of the commodity.
- **Quantity Desired—**Allows you to designate what quantities you want delivered and for which delivery period.

For each commodity listed on your requisition, first select the delivery periods and then enter the correct quantity for each delivery period in the field provided. You can enter partial, full, or multiple truck load quantities for a delivery period, depending on your needs (as shown in *Figure VI–8: Requisition Information [Non-Processed]*).

Note: For non-processed orders, certain commodities are ordered in pounds and others are ordered in cases. Be sure your requisition quantities are entered for the correct quantity type for each commodity (refer to the callouts in *Figure VI–7: Current Requisition [Non-Processed]*).

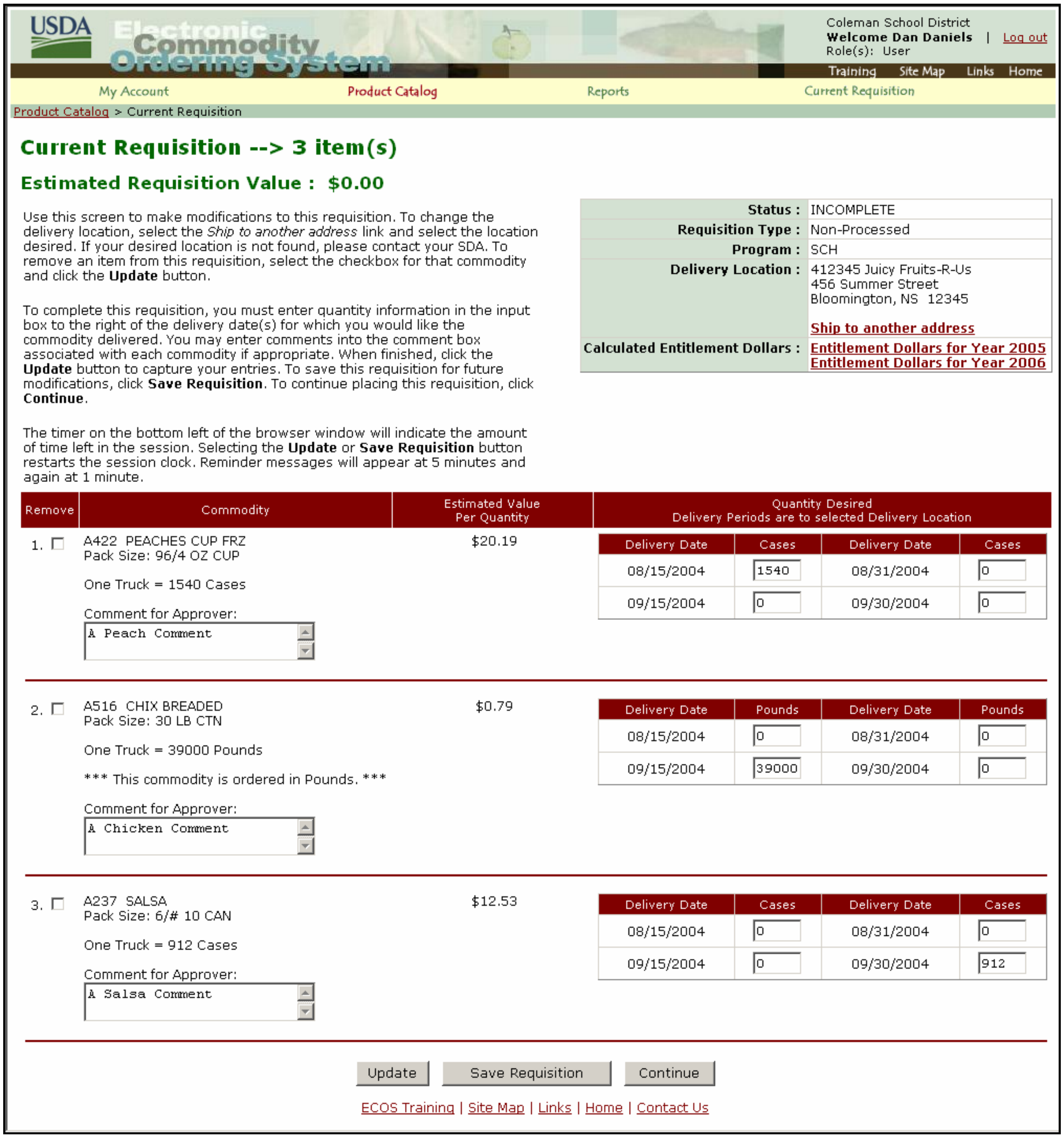


Figure VI-8: Requisition Information (Non-Processed)

If your requisitions are required to go through an approval process, you can use the Comment for Approver box to send any comments to your approver. Your comments will be displayed when the approver reviews your requisition. Refer to *Section VI.D Requisition Approval Process* for more details.

After you have entered all necessary information, you can continue the requisition process by clicking either the **Update** or **Continue** button at the bottom of the page. To save your requisition and work on it later, use the **Save Requisition** button (refer to *Section VI.B.2.b Save Requisition Button*).

a. Update Button

When you click the **Update** button, ECOS calculates the Estimated Requisition Value for your requisition. This value displays in the upper left-hand corner of the Information Area, just below the Current Requisition page title (as shown in *Figure VI–9: Updated Requisition [Non-Processed]*). **Note:** Bonus commodities do not show value, since they are not charged against entitlement.

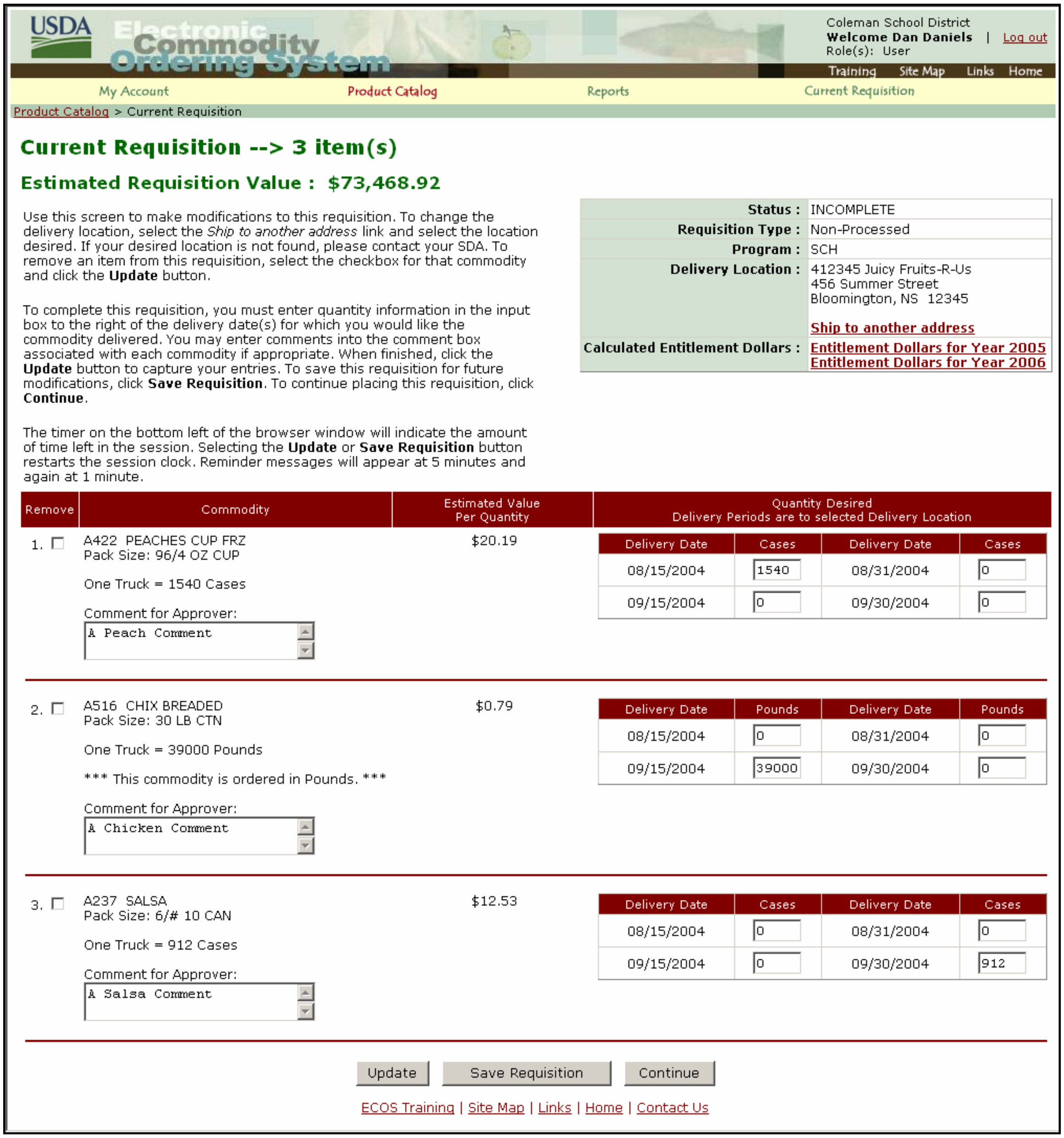


Figure VI-9: Updated Requisition (Non-Processed)

Located in the bottom left hand corner of your browser window is a timer. The timer displays the amount of time left in your session, counting down from 30 minutes. You can reset the session timer at any time during this 30-

minute timeframe by clicking the **Update** or **Save Requisition** button. However, if you leave the session idle, you will receive a warning message when there are five minutes remaining in your session (as shown in *Figure VI–10: Updated Requisition (Non-Processed) Time-out Message*).

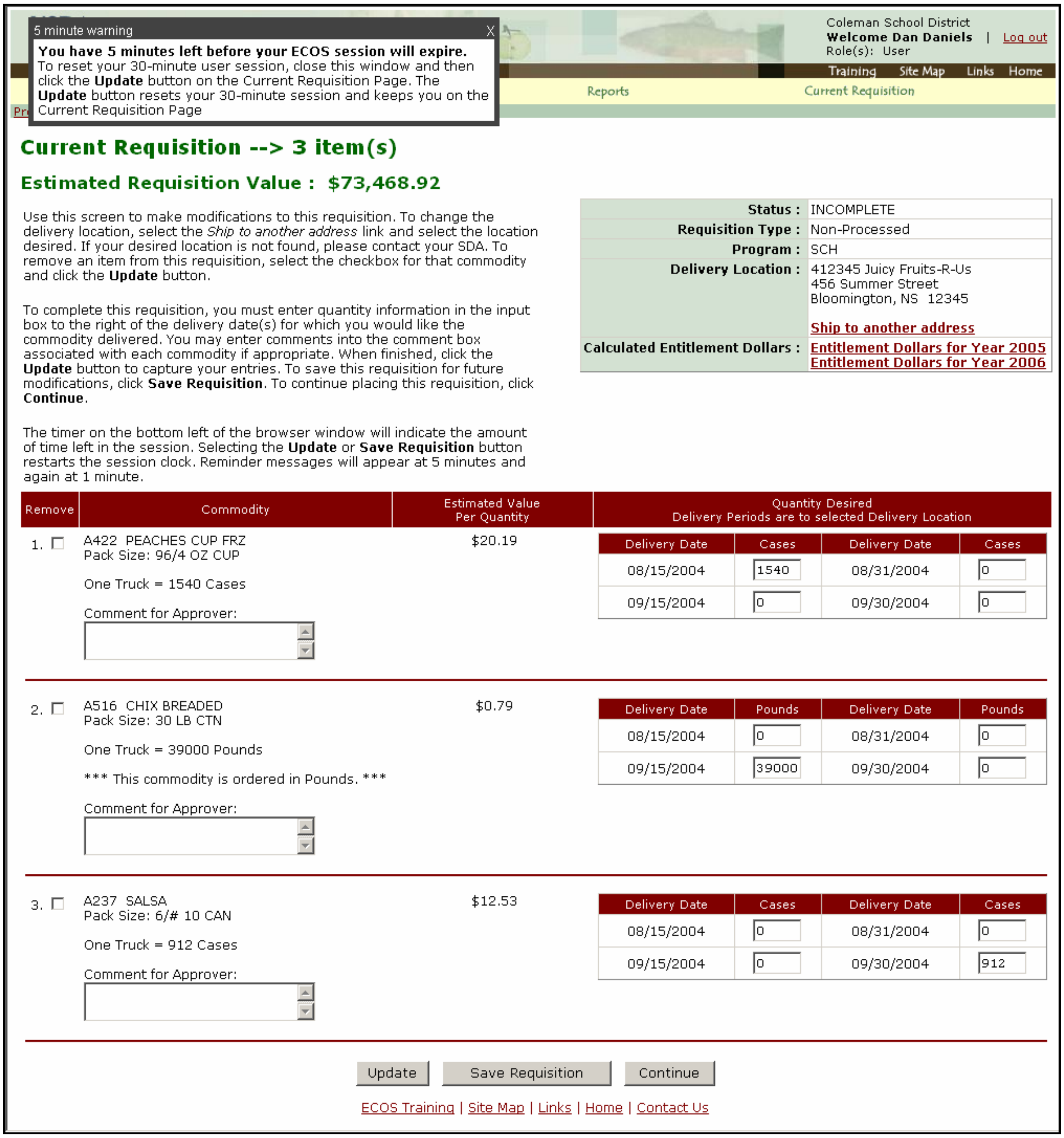
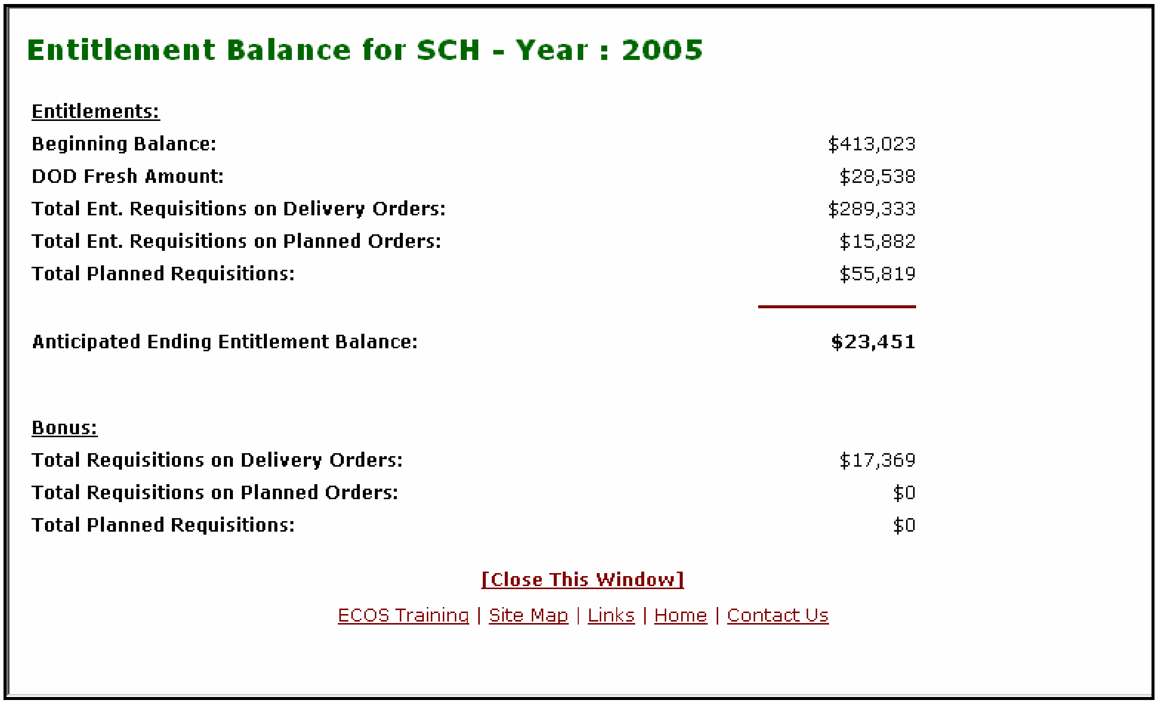


Figure VI-10: Updated Requisition (Non-Processed) Time-out Message

If the session still remains idle after the five minute warning, you will get another warning message when you have one minute remaining in your session. After one minute has expired, you will automatically be logged off the ECOS system.

There are **<u>Entitlement Dollars for Year #</u>** links located to the right of the instructions on this page. Click the link for the appropriate entitlement year; the Entitlement Balance page for that year's program displays (as shown in *Figure VI–11: Entitlement Balance [Non-Processed]).* You can compare your Estimated Requisition Value to your organization's calculated Entitlement Balance.



Entitlement Balance for SCH - Year : 2005

Entitlements:	
Beginning Balance:	$413,023
DOD Fresh Amount:	$28,538
Total Ent. Requisitions on Delivery Orders:	$289,333
Total Ent. Requisitions on Planned Orders:	$15,882
Total Planned Requisitions:	$55,819
Anticipated Ending Entitlement Balance:	**$23,451**
Bonus:	
Total Requisitions on Delivery Orders:	$17,369
Total Requisitions on Planned Orders:	$0
Total Planned Requisitions:	$0

[Close This Window]

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Figure VI-11: Entitlement Balance (Non-Processed)

b. Save Requisition Button

To save your requisition and work on it at a later time, click the **Save Requisition** button. The Current Requisition – Save Current Requisition page displays (as shown in *Figure VI–12: Current Requisition – Save Current Requisition [Non-Processed]*).

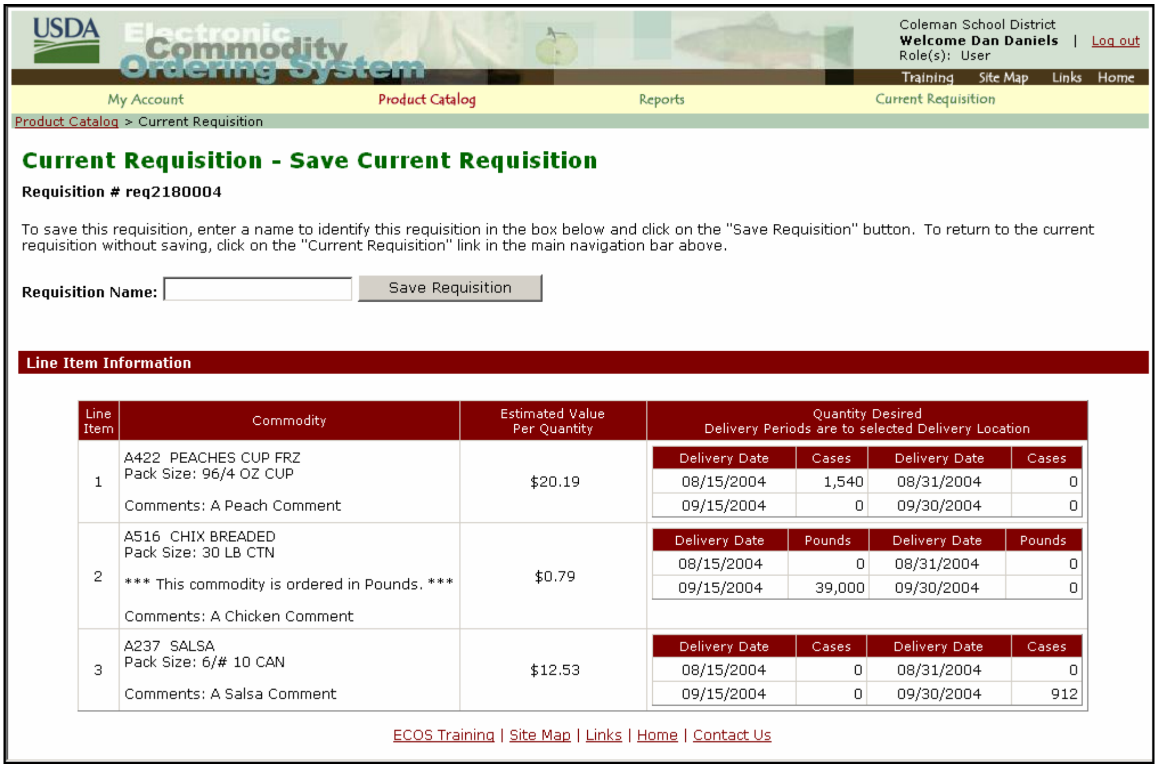


Figure VI-12: Current Requisition – Save Current Requisition (Non-Processed)

In the Requisition Name text box, enter a name for your requisition, then click the **Save Requisition** button. A page displays confirming that your requisition was saved.

When you return to ECOS to finish processing your requisition, click the **My Account** menu option on the ECOS Toolbar. Click the **Saved Requisitions** link in the Worklist or Information Area on this page. The Saved Requisitions page displays with the name of your saved requisition in the list (as shown in *Figure VI–13: Saved Requisitions [Non-Processed]*).

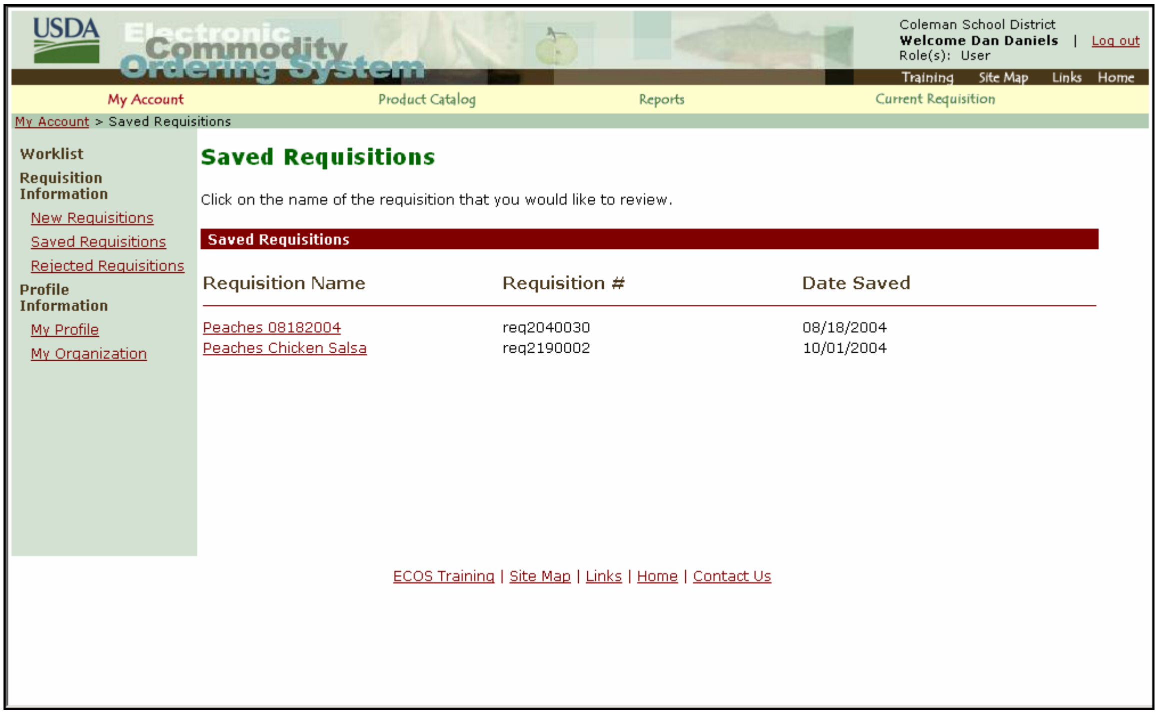


Figure VI-13: Saved Requisitions (Non-Processed)

Click the **Requisition Name** link to resume work on your requisition. The Saved Requisition Review page displays (as shown in *Figure VI–14: Saved Requisition Review [Non-Processed]*).

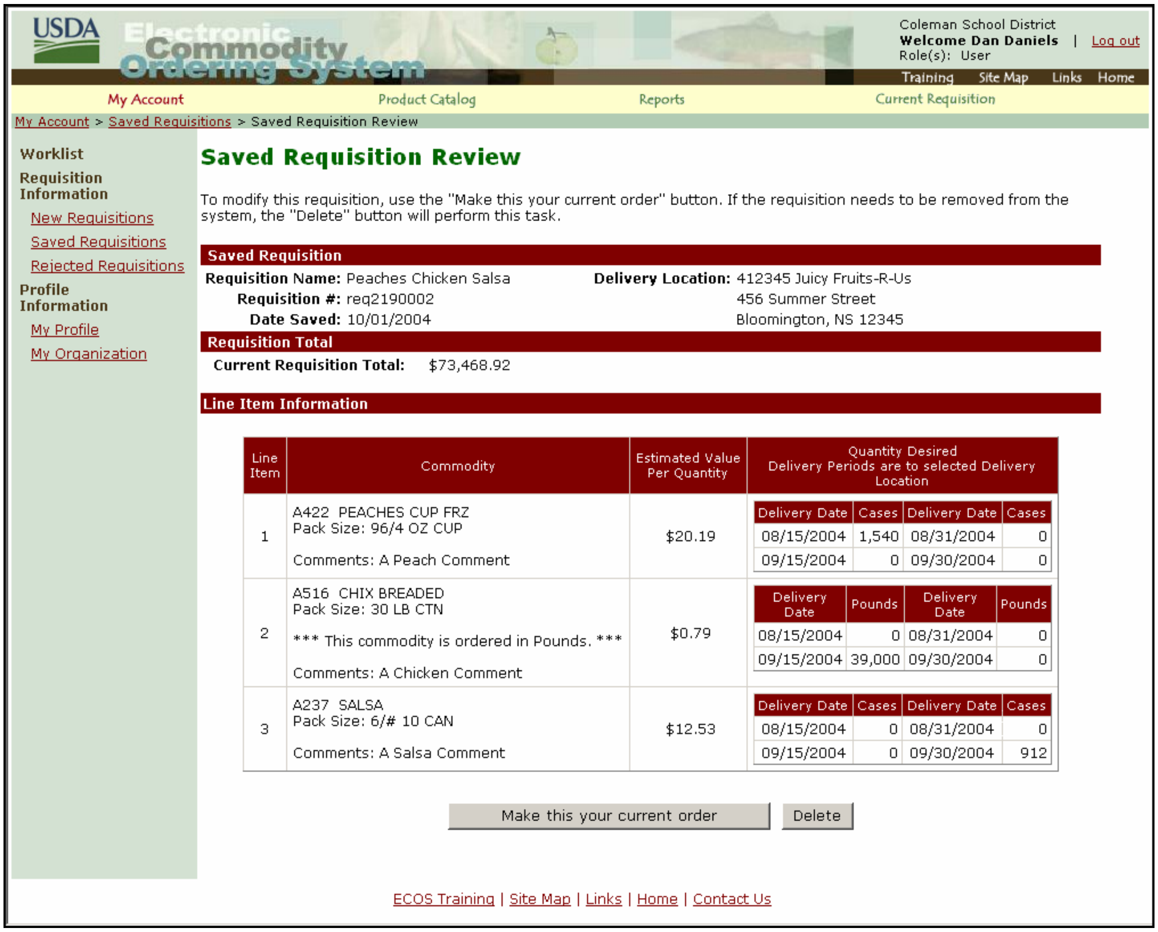


Figure VI-14: Saved Requisition Review (Non-Processed)

Click the **Make this your current order** button to continue updating this requisition. The Current Requisition page displays (as shown in *Figure VI–15: Saved Current Requisition [Non-Processed]*). To delete this requisition, click the **Delete** button.

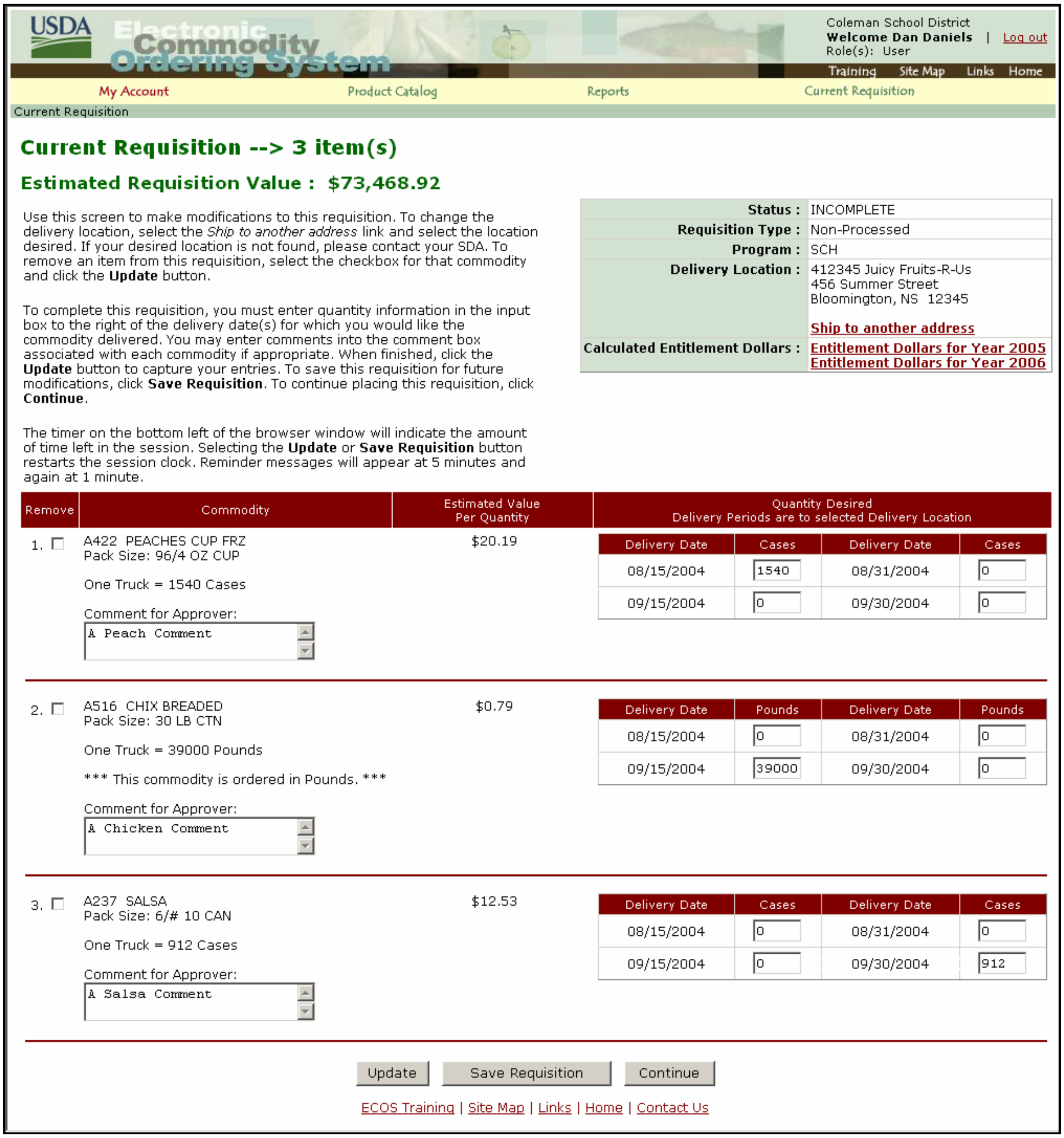


Figure VI-15: Saved Current Requisition (Non-Processed)

Note: ECOS also has a limited auto-save feature. If you are working on a requisition and accidentally click on another page or get logged out of the system, ECOS will automatically save the last requisition you were working on. To recover the last requisition worked on, click the **Current Requisition** menu option on the ECOS Toolbar. Comments and quantities will only be saved if the **Update** button is clicked.

c. Continue Button

When you click the **Continue** button, the Confirm Requisition page displays (as shown in *Figure VI–16: Confirm Requisition [Non-Processed]*).

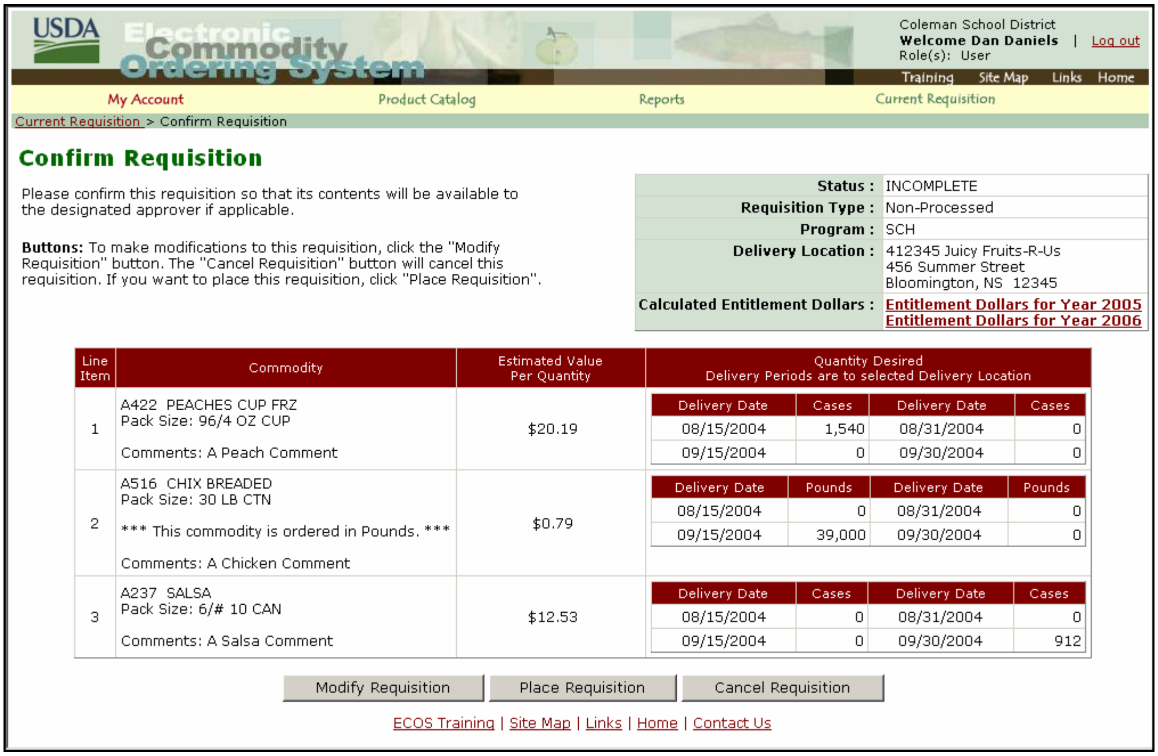


Figure VI-16: Confirm Requisition (Non-Processed)

On the Confirm Requisition page, your requisition information displays for final review. At this point, you can modify, place, or cancel the requisition by clicking the appropriate button, as described below.

- **Modify Requisition** button—Returns you to the Current Requisition page where you will be able to update the requisition.
- **Place Requisition** button—Displays the Thank You For Your Request page (as shown in *Figure VI–17: Thank You For Your Request [Non-Processed]*).
- **Cancel Requisition** button—Cancels the requisition. Since you will not receive a prompt asking if you are certain that you want to cancel the requisition, make sure you want to cancel before clicking the **Cancel Requisition** button.

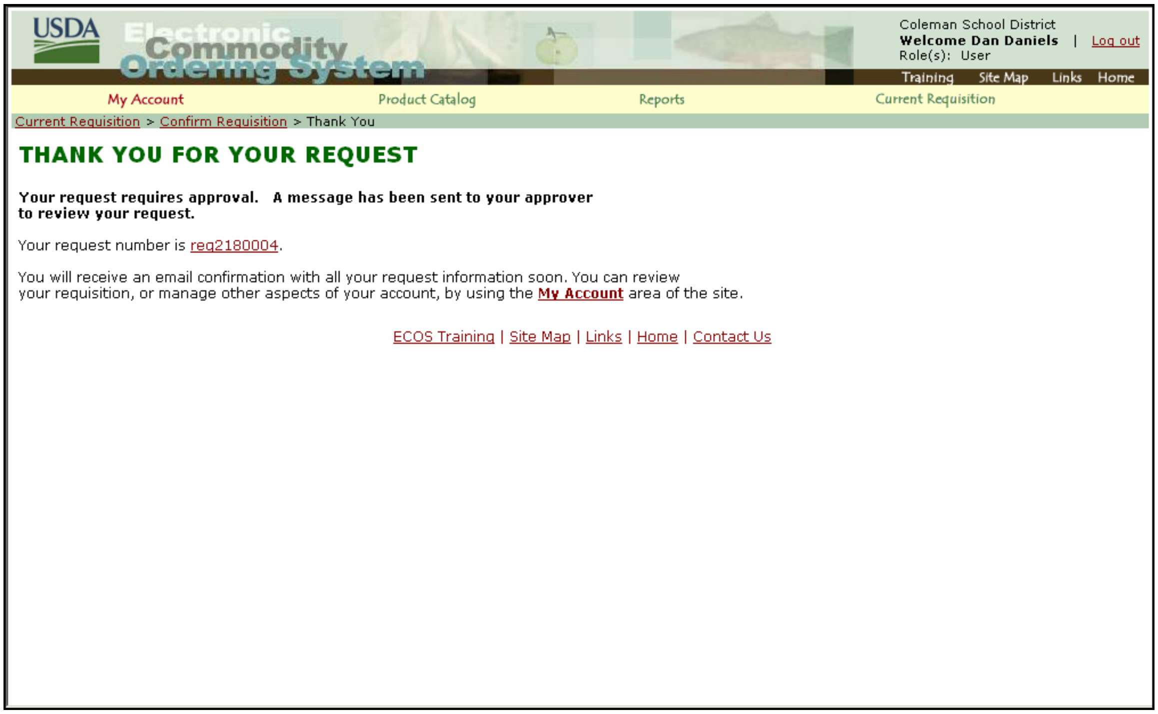


Figure VI-17: Thank You For Your Request (Non-Processed)

If your requisition is required to go through an approval process, it is then submitted to your approver for review. If not, it is sent directly to the SA for rollup into full truckloads and order submission to USDA. In either case, if your current e-mail address is on your ECOS profile (refer to *Section IV.B Editing My Profile*), you will receive an e-mail confirmation outlining the details of your requisition.

If your requisition is going through the approval process, your approver will also receive an e-mail notification that your requisition is ready for review. After your approver reviews your requisition, he or she will either approve or reject it. If approved, the requisition is automatically sent on to the SA for rollup into full truckloads and order submission to USDA, and you will receive an e-mail notification that your requisition was approved. If your requisition is rejected, it will be returned to you for editing (refer to *Section VI.D.2 Rejecting a Requisition*) and you will receive an e-mail notification.

3. Create a Processed Requisition

A processed requisition is a request for bulk commodity products to be sent to a processor to be further processed into more usable end items (for example, bulk chicken into chicken nuggets). SAs have determined how the processing program works within the state, and have created processors in ECOS. RAs can place requisitions to those processors by using a “processed requisition.”

To place a processed requisition, select a Product Category from either the Homepage or Product Catalog page. The Poultry/Eggs category (as shown in

Figure VI–18: Product Catalog – Poultry/Eggs [Processed]) is used as an example.

Figure VI-18: Product Catalog - Poultry/Eggs (Processed)

The first step in creating a processed requisition is to indicate the Requisition Type and Program. These fields are located in the "Please Select" box in the upper right-hand corner of the Work Area of the Product Category page (refer to *Figure VI–18: Product Catalog – Poultry/Eggs [Processed]*). **Note:** The Delivery Location field is also listed in the "Please Select" box, but is not used when creating a processed requisition.

Since the default selection for Requisition Type is "Non-Processed," you will need to select "Processed" for the Requisition Type, and then select the appropriate program in the Program drop-down list box. Only those programs you administer will be shown. When you change the program, the catalog will be refreshed with the commodity(ies) applicable to that program.

After selecting the Requisition Type and Program, you can begin filling your shopping cart with commodities. To do this, scroll through the list of commodity offerings and determine which commodities you would like to add to your requisition. Click the selection box under the Add to Cart column for each commodity you wish to add to your cart. After selecting your desired commodity or commodities, click the **Add to Cart** button at the bottom of the page. If the list

of commodities exceeds the length of the page, you may need to scroll down to the bottom of the page to find the **Add to Cart** button.

The **Clear** button allows you to clear any commodity selections you have made that have not been added to your cart. It will have no effect on commodity selections that you have already added to your cart; those will remain. If you wish to remove a commodity from your cart, you will be able to do so after you go through the check–out process.

When you click the **Add to Cart** button, the Requisition Type, Program, and Delivery Location fields in the "Selected Items" box become permanent (as shown in *Figure IV–19: Add to Cart - Poultry/Eggs [Processed]*). At this point, you can no longer make changes to these fields on this page.

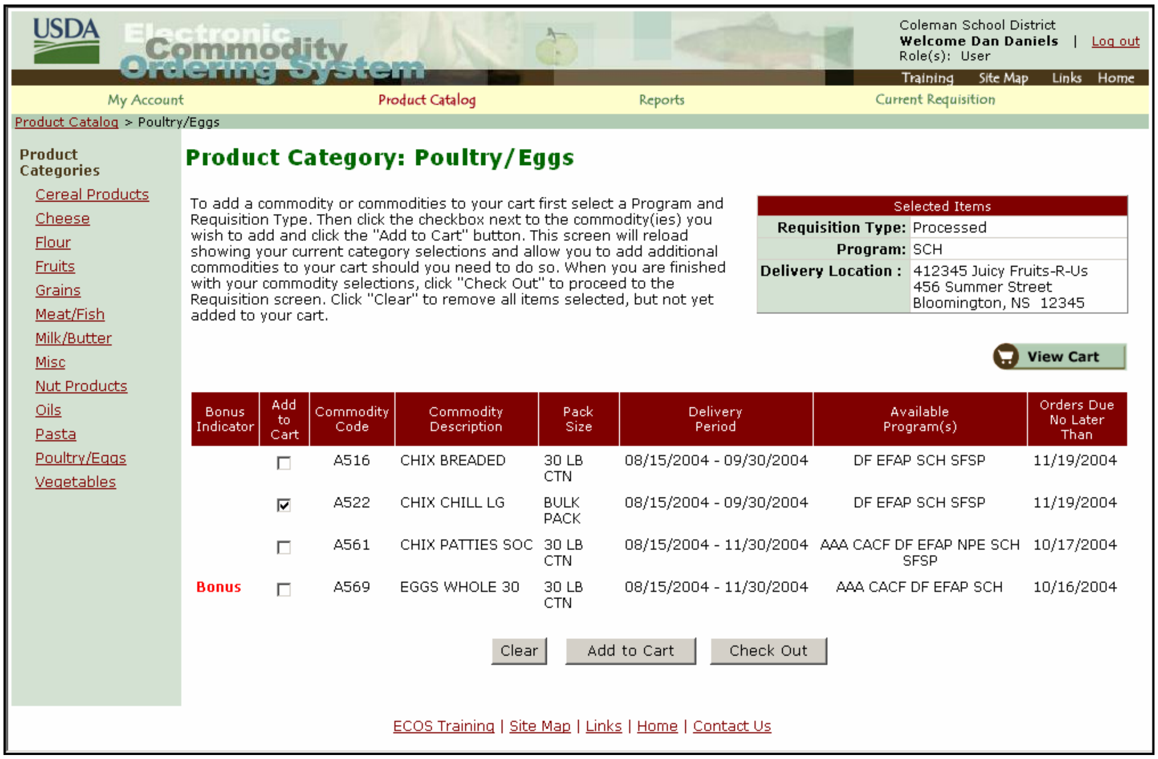


Figure VI-19: Add to Cart – Poultry/Eggs (Processed)

After adding commodities to your cart for a particular Product Category, you can click any other Product Category in the Product Categories and continue adding commodities for this same requisition.

Note: For processed delivery orders, if you selected a commodity that is not associated with a processor, you will be prompted with an error message. To associate that commodity to a processor, you must contact your SA.

You can check the contents of your shopping cart at any time by clicking the **View Cart** button. A small window opens and a list of the commodities in your shopping cart displays (as shown in *Figure VI–20: View Cart [Processed]*).

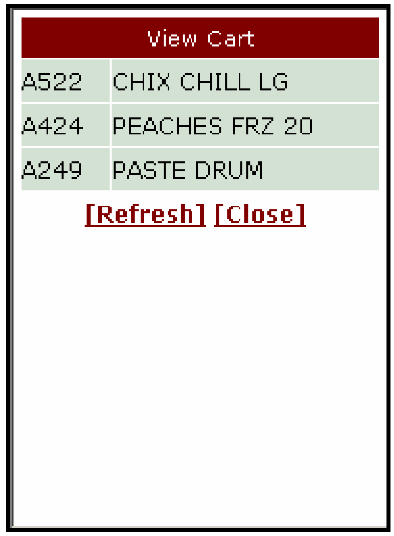


Figure VI-20: View Cart (Processed)

After you finish adding commodities to your requisition, you can check out. Do this by scrolling to the bottom of the page and clicking the **Check Out** button (refer to *Figure VI–19: Add to Cart – Poultry/Eggs [Processed]).* The Current Requisition page displays (as shown in *Figure VI–21: Current Requisition [Processed]*).

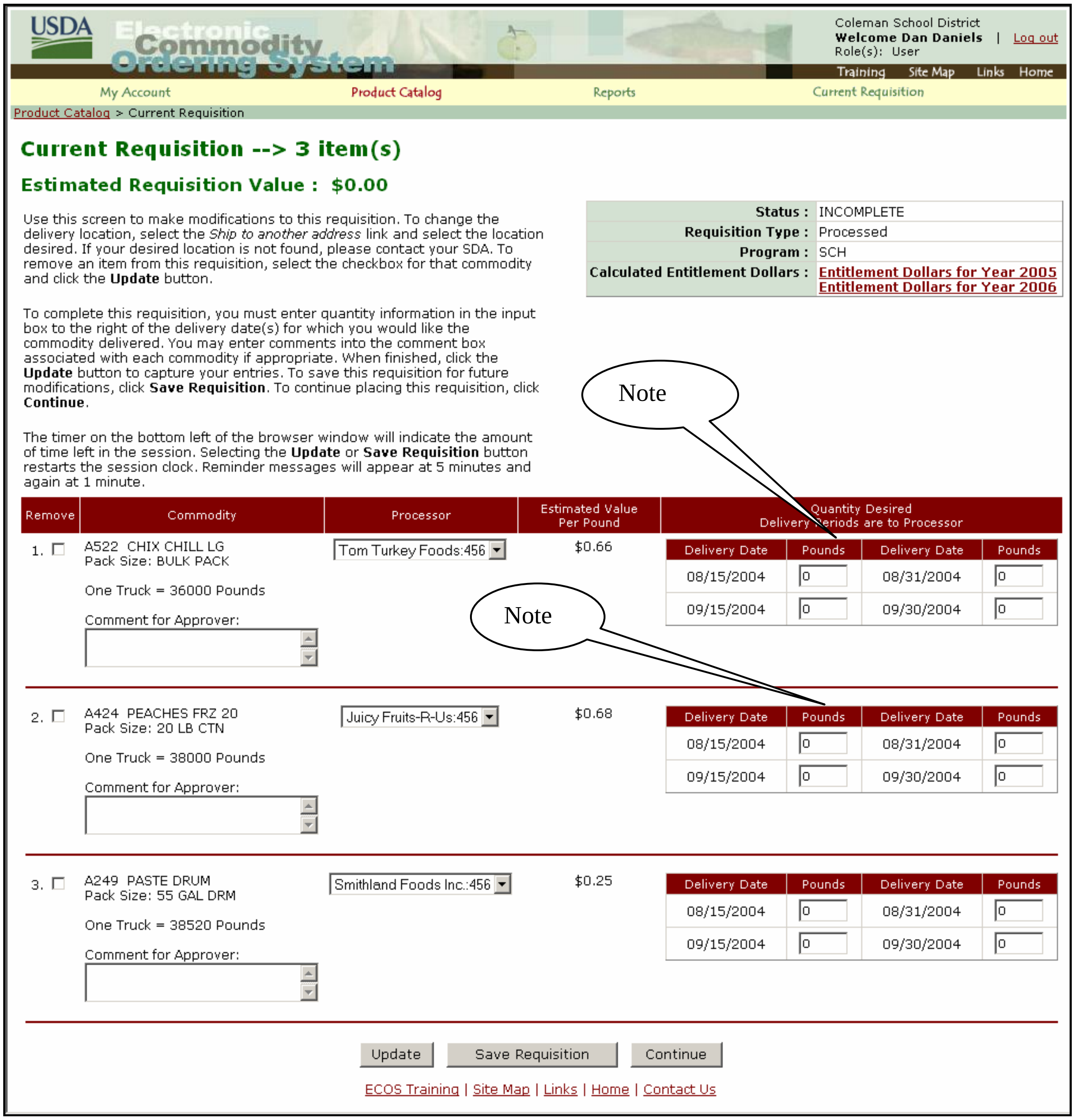


Figure VI-21: Current Requisition (Processed)

All the commodities that you added to your shopping cart are now listed on the Current Requisition page. A description of the column headings is provided below:

- **Remove**—Allows you to remove a commodity from your requisition by clicking the selection box (a check will display in the box) and clicking the **Update** button at the bottom of your list of commodities. That commodity is then removed from your requisition.
- **Commodity—**The information listed here includes the commodity code, commodity name, pack size, and full truck quantity.
- **Processor—**The processor drop-down box lists all processors that your SA has designated as eligible to process your commodity.
- **Estimated Value Per Pound—**The current estimated purchase cost of a pound of this commodity.
- **Quantity Desired—**Allows you to designate what quantities you want delivered and for which delivery period. **Note:** Commodities being sent to a processor are always ordered in pounds (refer to the callouts in *Figure VI–21: Current Requisition [Processed]*).

For each commodity listed on your requisition, you will need to select the appropriate processor from the Processor drop-down list box by clicking on the down arrow next to the processor. You will also need to determine which delivery periods you would like your commodity delivered and enter the correct quantity for each delivery period in the field provided.

You can enter partial, full, or multiple truck load quantities in pounds for a delivery period, depending on the number of pounds needed to produce the quantity of finished product you desire (as shown in *Figure VI–22: Requisition Information [Processed]*). Your SA should provide information to enable you to calculate the number of pounds necessary for the desired quantity of finished end product.

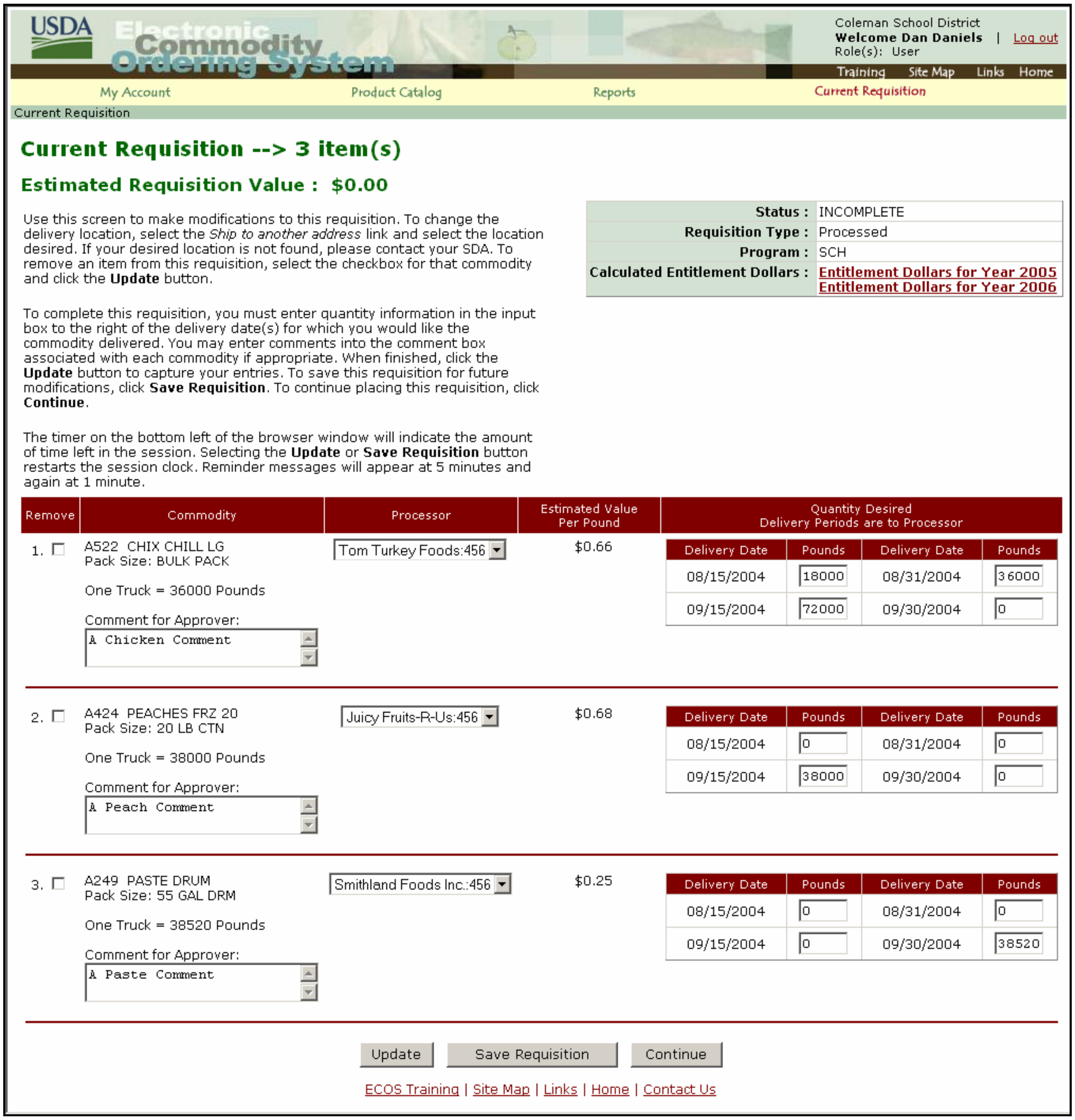


Figure VI-22: Requisition Information (Processed)

If your requisition is required to go through an approval process, you can use the Comment for Approver box to send any comments to your approver. Your comments will display when the approver reviews your requisition. Refer to *Section VI.D Requisition Approval Process* for more details.

After you have entered all necessary information, you can continue the requisition process by clicking either the **Update** or **Continue** button at the bottom of the page. To save your requisition and work on it later, use the **Save Requisition** button (refer to *Section VI.B.3.b Save Requisition Button*).

a. Update Button

When you click the **Update** button, ECOS calculates the Estimated Requisition Value for your requisition. This value displays in the upper left-hand corner of the Work Area, just below the page title "Current Requisition" (as shown in *Figure VI–23: Updated Requisition [Processed]*). **Note:** Bonus commodities do not show value, since they are not charged against entitlement.

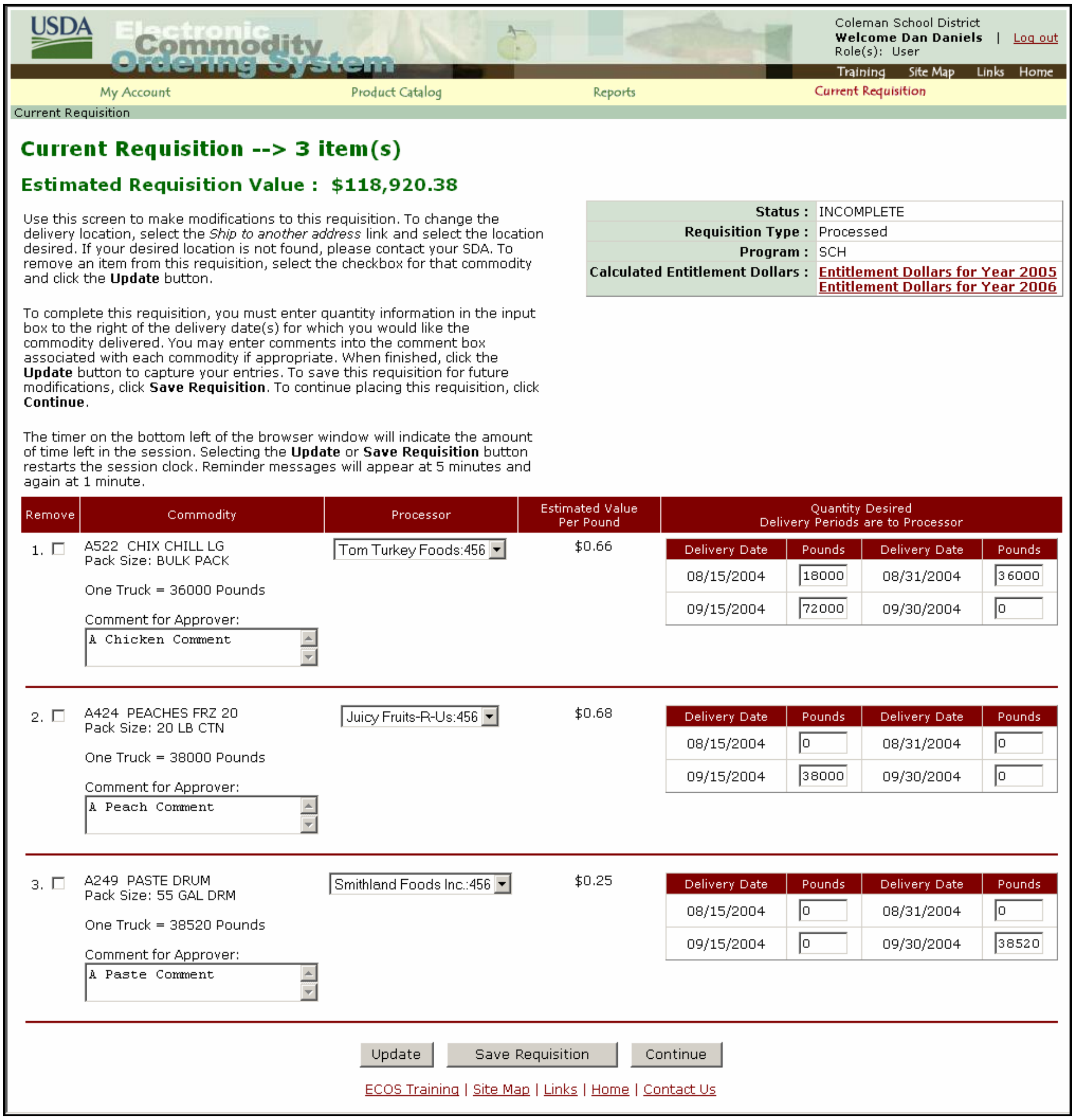


Figure VI-23: Updated Requisition (Processed)

In the bottom left hand corner of your browser window is a timer. The timer displays the amount of time left in your session, counting down from 30 minutes. You can reset the session timer at any time during this 30 minute timeframe by clicking the **Update** or **Save Requisition** button. However, if you leave the

session idle, you will receive a warning message when you have five minutes remaining in your session (as shown in *Figure VI–24: Updated Requisition (Processed) Time-out Message*).

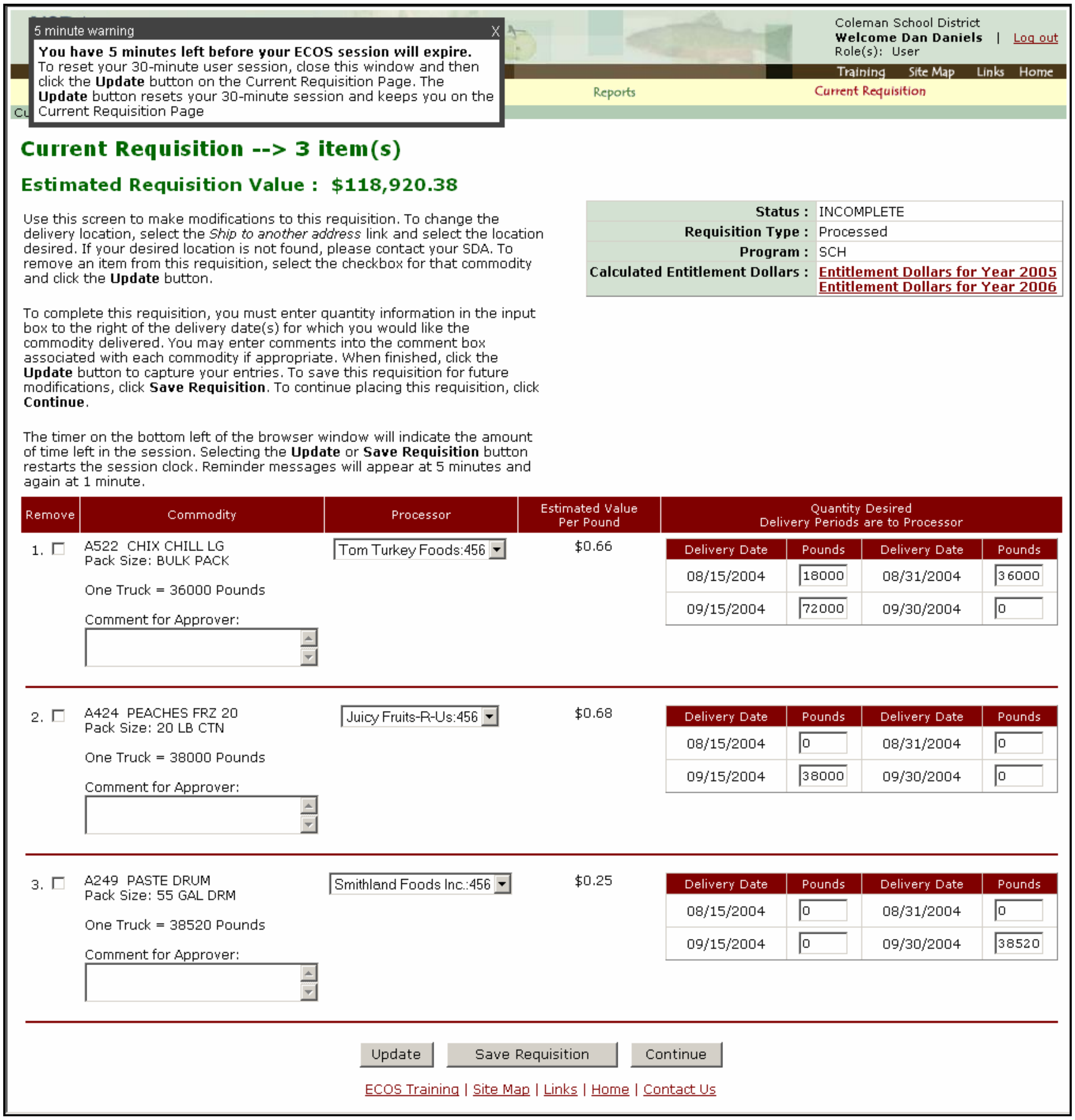
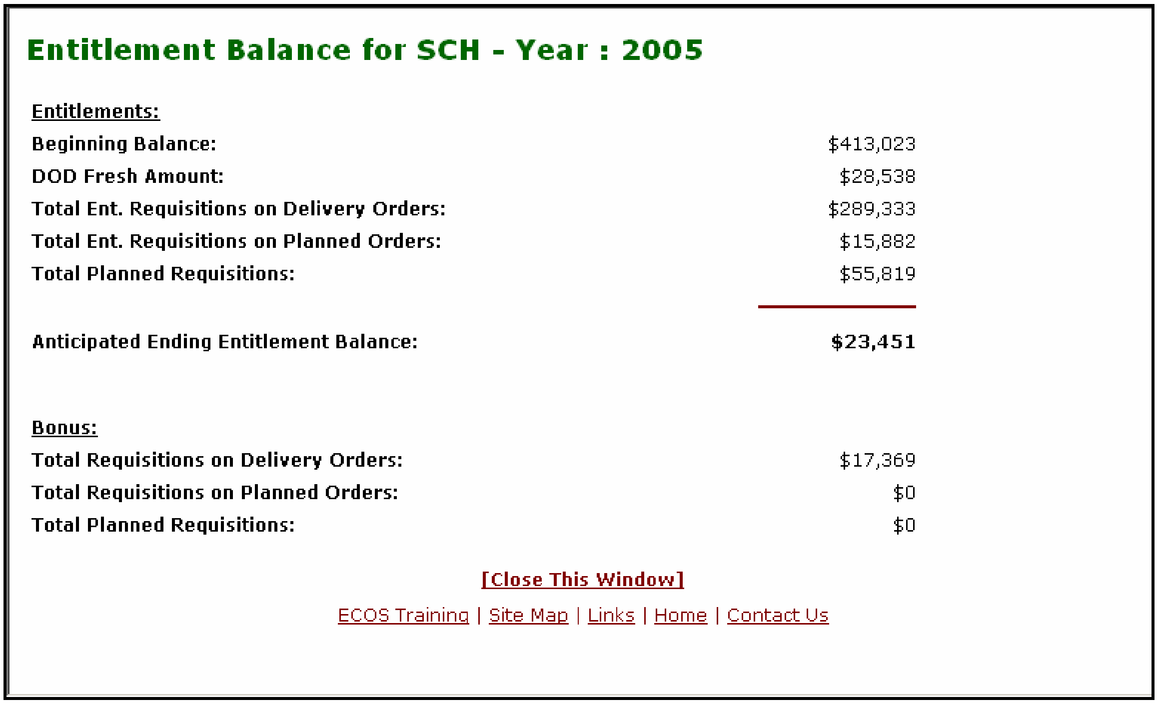


Figure VI-24: Updated Requisition (Processed) Time-out Message

There are **Entitlement Dollars for Year #** links located to the right of the instructions on this page. Click the link for the appropriate entitlement year; the Entitlement Balance page for that year's program displays (as shown in *Figure VI–25: Entitlement Balance [Processed]).* You can compare your Estimated Requisition Value to your organization's calculated Entitlement Balance.



Entitlement Balance for SCH - Year : 2005

Entitlements:	
Beginning Balance:	$413,023
DOD Fresh Amount:	$28,538
Total Ent. Requisitions on Delivery Orders:	$289,333
Total Ent. Requisitions on Planned Orders:	$15,882
Total Planned Requisitions:	$55,819
Anticipated Ending Entitlement Balance:	**$23,451**
Bonus:	
Total Requisitions on Delivery Orders:	$17,369
Total Requisitions on Planned Orders:	$0
Total Planned Requisitions:	$0

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Figure VI-25: Entitlement Balance (Processed)

b. Save Requisition Button

To save your requisition and work on it at a later time, click the **Save Requisition** button. The Current Requisition – Save Current Requisition page displays (as shown in *Figure VI–26: Current Requisition – Save Current Requisition [Processed]*).

Figure VI-26: Current Requisition – Save Current Requisition (Processed)

In the Requisition Name text box, enter a name for your requisition, then click the **Save Requisition** button. A page displays confirming that your requisition was saved.

When you return to ECOS to finish processing your requisition, click the **My Account** menu option on the ECOS Toolbar. Click the **Saved Requisitions** link in the Worklist or Information Area on this page. The Saved Requisitions page displays with the name of your saved requisition(s) in the list (as shown in *Figure VI–27: Saved Requisitions [Processed]*).

Figure VI-27: Saved Requisitions (Processed)

Click the **Requisition Name** link to resume work on your requisition. The Saved Requisition Review page displays (as shown in *Figure VI–28: Saved Requisition Review [Processed]*).

Figure VI-28: Saved Requisition Review (Processed)

Click the **Make this your current order** button to continue updating this requisition. The Current Requisition page displays (as shown in *Figure VI–29: Saved Current Requisition [Processed]*). To delete this requisition, click the **Delete** button.

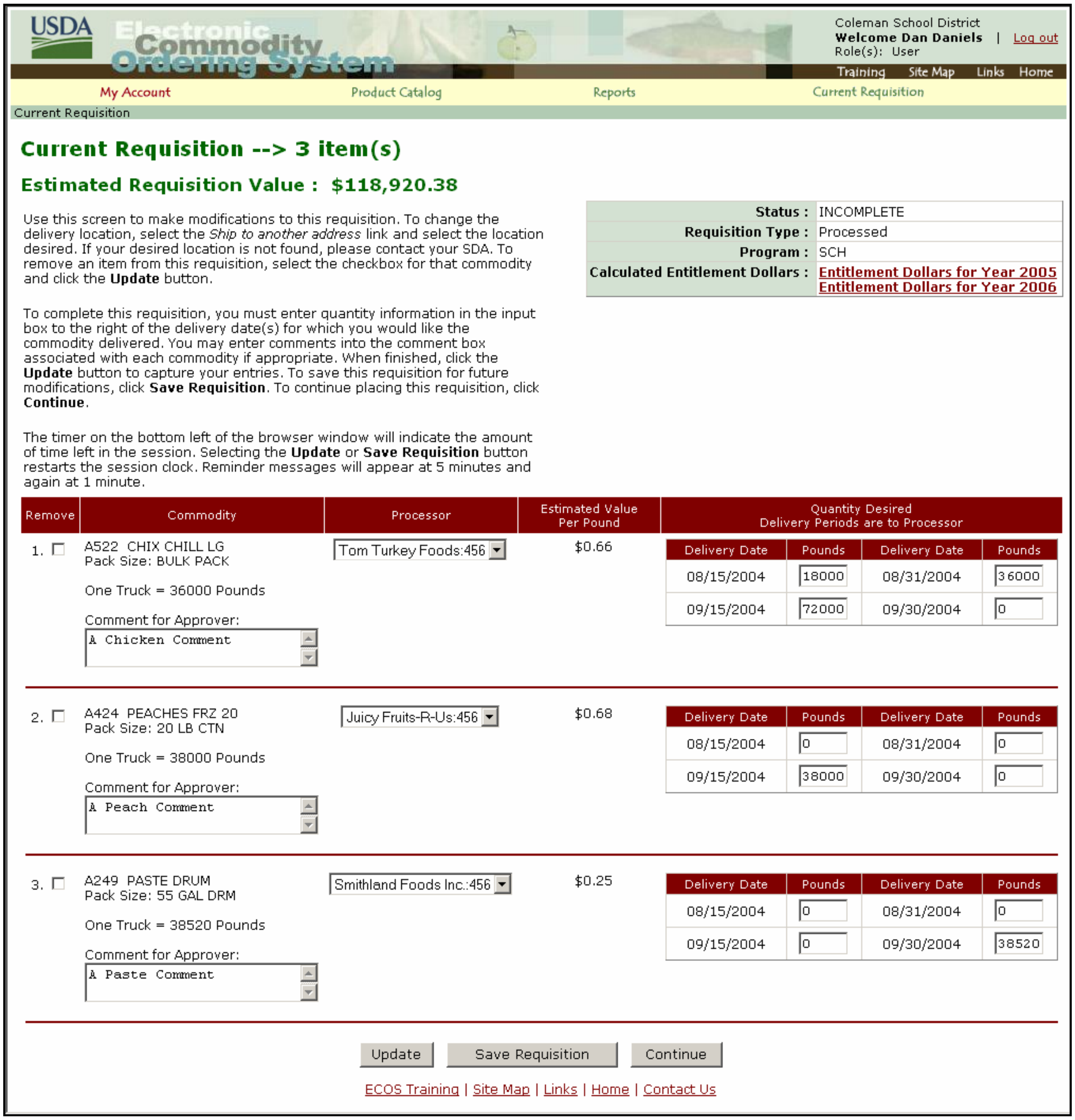


Figure VI-29: Saved Current Requisition (Processed)

Note: ECOS also has a limited auto-save feature. If you are working on a requisition and accidentally click on another page or get logged out of the system, ECOS will automatically save the last requisition you were working on. To recover the last requisition worked on, click the **Current Requisition** menu option on the ECOS Toolbar. Comments and quantities will only be saved if the **Update** button is clicked.

c. Continue Button

When you click the **Continue** button, the Confirm Requisition page displays (as shown in *Figure VI–30: Confirm Requisition [Processed]*).

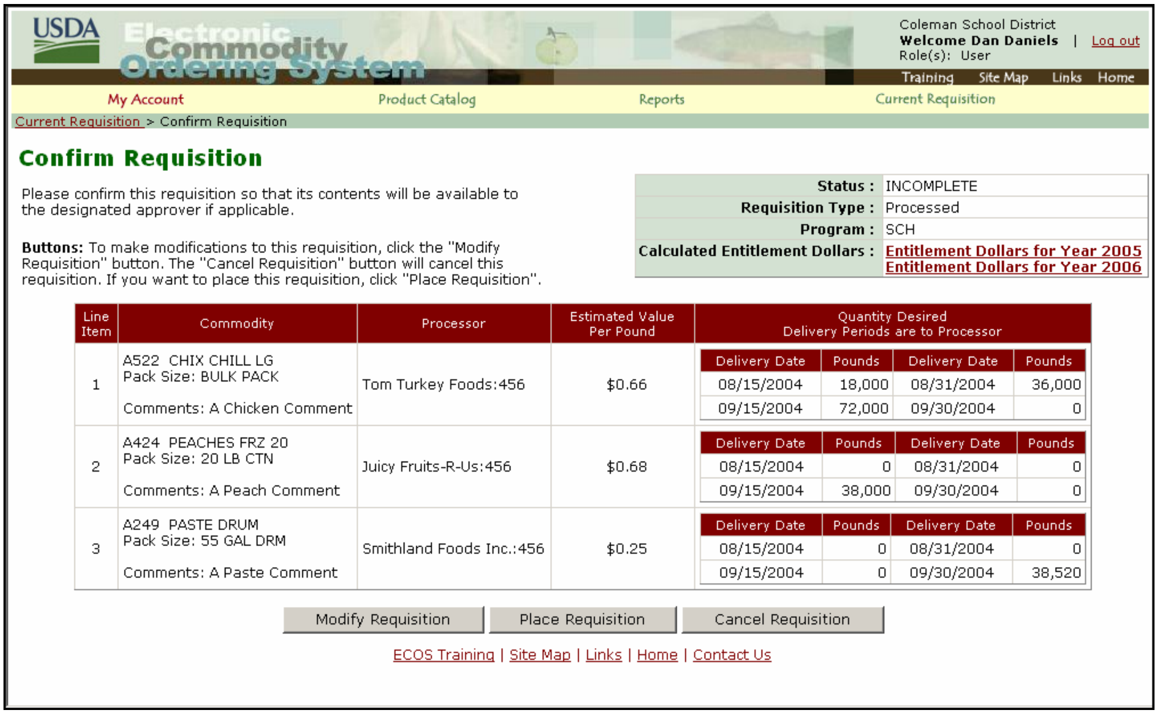


Figure VI-30: Confirm Requisition Page (Processed)

On the Confirm Requisition page, your requisition information displays for final review. After reviewing the information, you can modify, place, or cancel the requisition by clicking the appropriate button.

- **Modify Requisition** button—Returns you to the Current Requisition page where you will be able to update the requisition.
- **Place Requisition** button—Displays the Thank You For Your Request page (as shown in *Figure VI–31: Thank You For Your Request [Processed]*).
- **Cancel Requisition** button—Cancels the requisition. Since you will not receive a prompt asking if you are certain that you want to cancel the requisition, make sure you want to cancel before clicking the **Cancel Requisition** button.

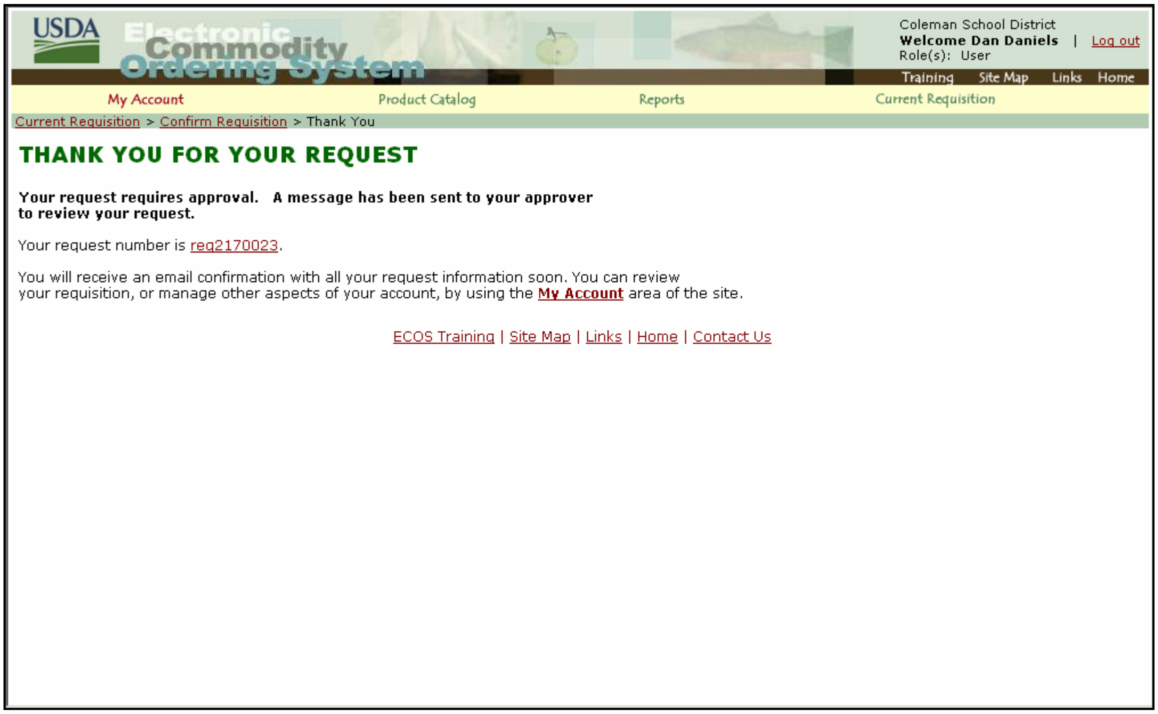


Figure VI-31: Thank You For Your Request (Processed)

If your requisition is required to go through an approval process, it is then submitted to your approver for review. If not, it is sent directly to the SA for rollup into full truckloads and order submission to USDA. In either case, if your current e-mail address is in the ECOS profile (refer to *Section IV.B.1 Edit Personal Information*), you will receive an e-mail confirmation outlining the details of your requisition.

If your requisition is going through the approval process, your approver will also receive an e-mail notification that your requisition is ready for review. After your approver reviews your requisition, he or she will either approve or reject it. If approved, the requisition is automatically sent on to the SA for rollup into full truckloads and order submission to USDA, and you will receive an e-mail notification that your requisition was approved. If your requisition is rejected, it will be returned to you for editing (refer to *Section VI.D.2 Rejecting a Requisition*) and you will receive an e-mail notification.

4. View New Requisitions (Org Admin and User)

To view requisitions you recently submitted, access the My Account page (as shown in *Figure VI–32: My Account*), then click the **New Requisitions** link. A list of recently placed requisitions displays. Click a requisition in the list to view it in detail. These will appear the day the requisition was submitted, and then will disappear from the New Requisitions page.

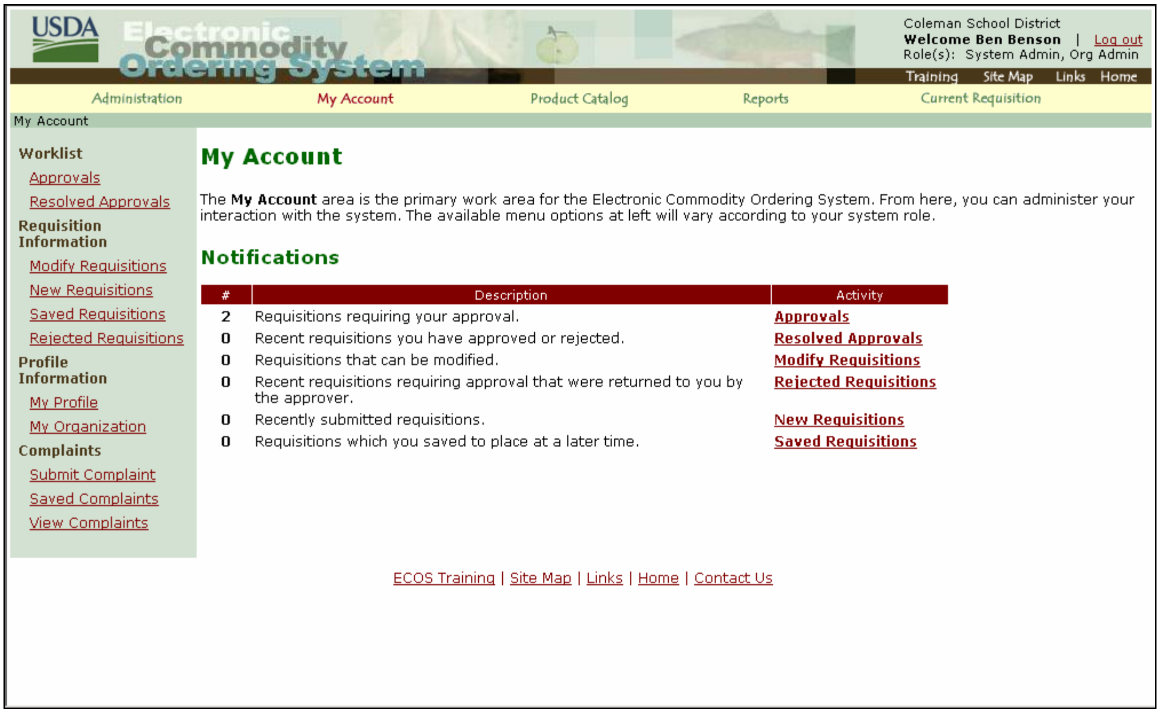


Figure VI-32: My Account

C. Modifying Requisitions (Org Admin)

The Modify Requisitions process allows an Org Admin to modify requisitions that have been placed but have not been rolled up. Requisitions requiring approval or requisitions that are in the status of "At SDA Awaiting Roll Up," can not be modified.

Requisitions can be modified by clicking the **<u>Modify Requisitions</u>** link in the box on the left-hand side of the page under the Requisition Information section or the **<u>Modify Requisitions</u>** link on the My Account page in the Activity column (as shown in *Figure VI–33: My Account (Modify Requisitions Link)*). The Notifications section of the My Account page displays the number of requisitions that can be modified.

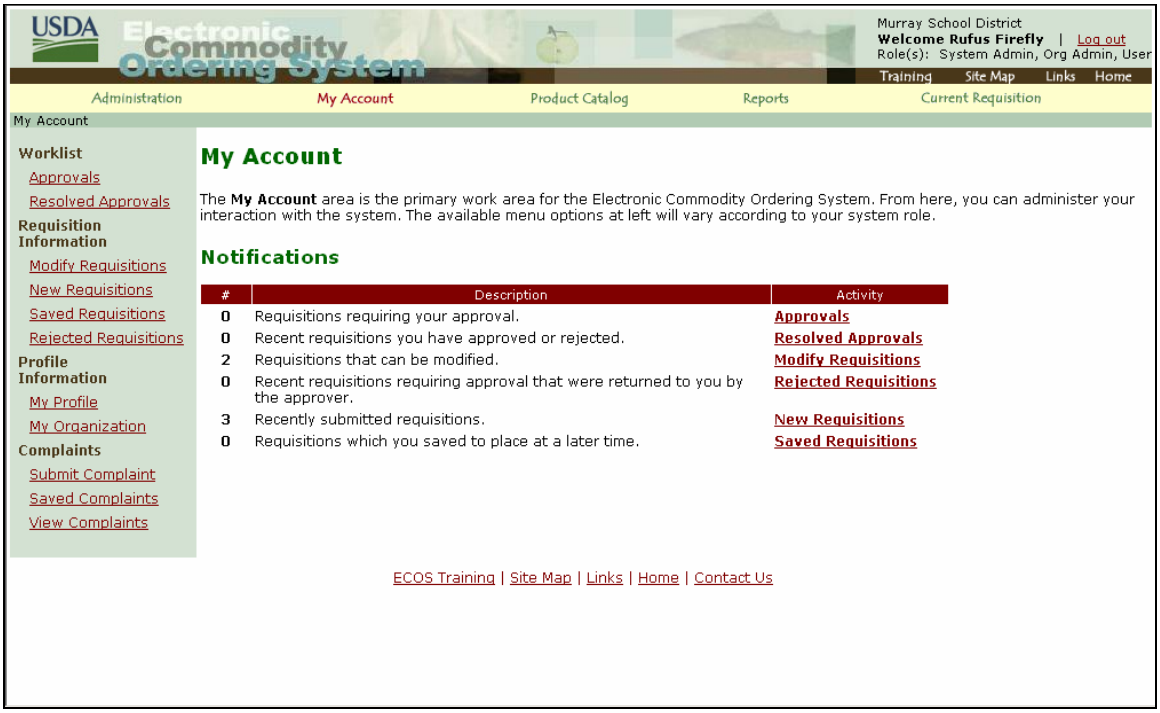


Figure VI-33: My Account (Modify Requisitions Link)

Once the **Modify Requisitions** link is selected, the Modify Requisitions – Summary page displays (as shown in *Figure VI–34: Modify Requisitions - Summary*).

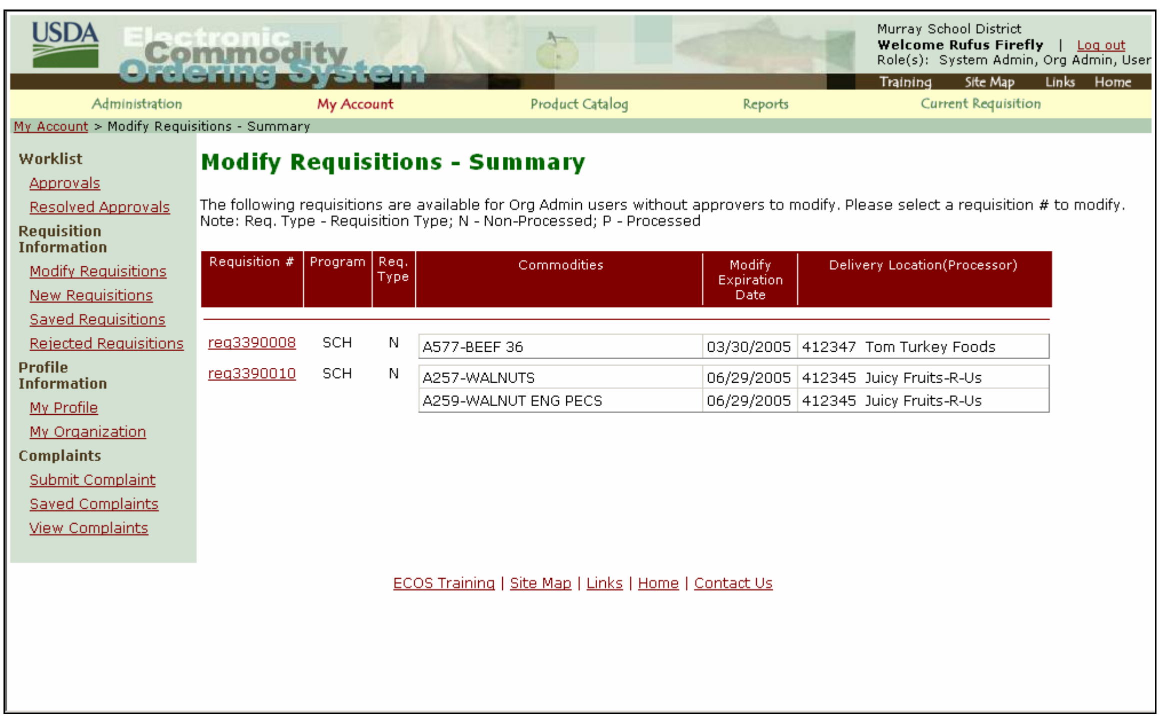


Figure VI-34: Modify Requisitions – Summary

To modify a requisition, click the **Requisition Number** under the Requisition # column. The Modify Requisition page displays (as shown in *Figure VI–35: Modify Requisition*).

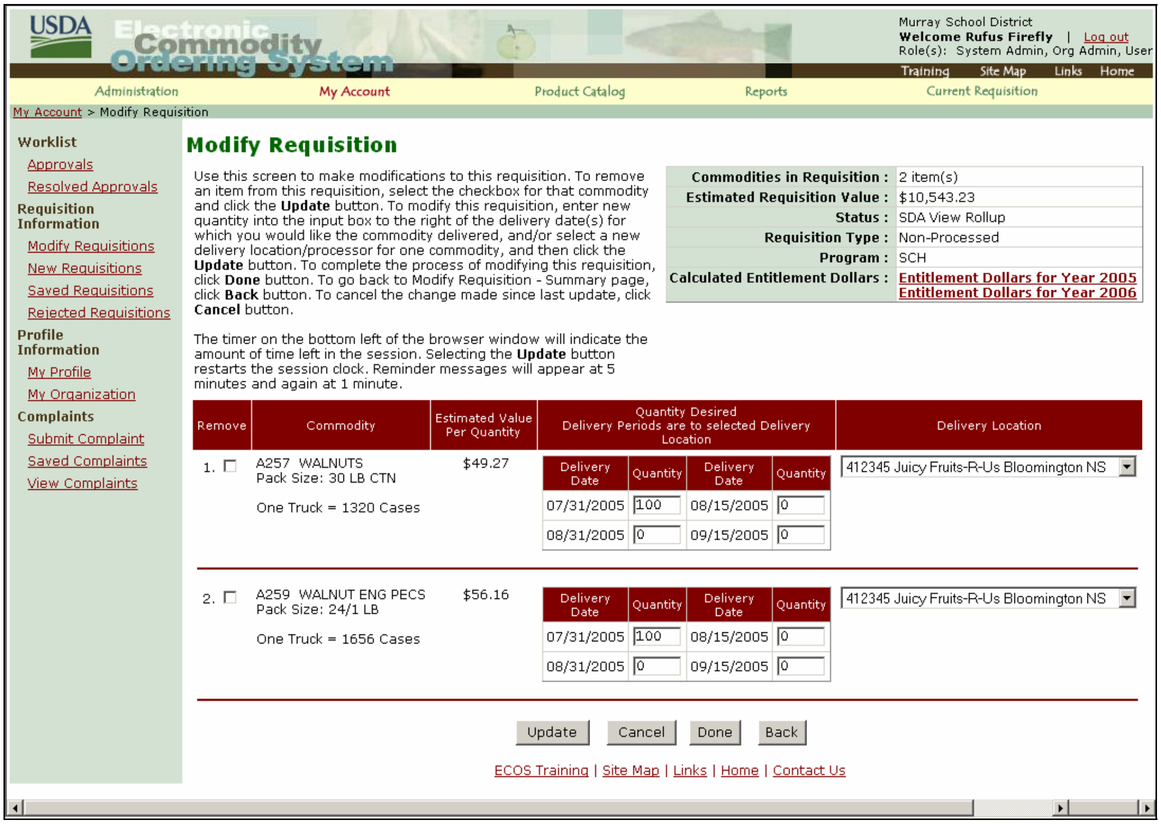


Figure VI-35: Modify Requisition

There are three types of modifications that can be made on this page. The delivery location can be changed, quantities can be changed, and commodities can be removed. Each of these modifications should be followed by clicking the **Update** button. To cancel changes made prior to clicking the **Update** button, click the **Cancel** button. To go back to the Modify Requisition – Summary page, click the **Back** button.

To modify the delivery location, make a selection from the drop-down list box under the Delivery Location column. Then click the **Update** button. The Modify Requisition page will redisplay with the modified delivery location (as shown in *Figure VI–36: Modify Requisition (Modify Delivery Location)*).

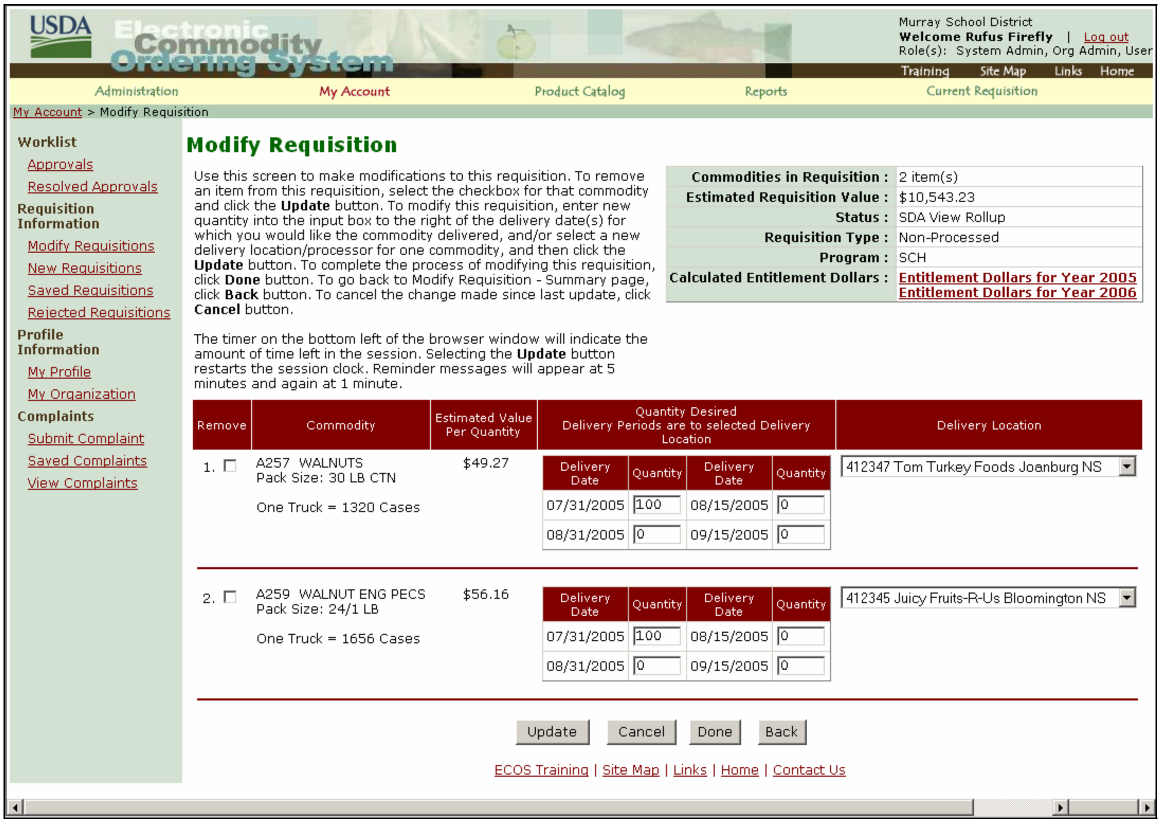


Figure VI-36: Modify Requisition (Modify Delivery Location)

To modify quantities, change the quantities under the Quantity column for the desired delivery dates. Then click the **Update** button. The Modify Requisition page will redisplay with the modified quantities (as shown in *Figure VI–37: Modify Requisition (Modify Quantities)*).

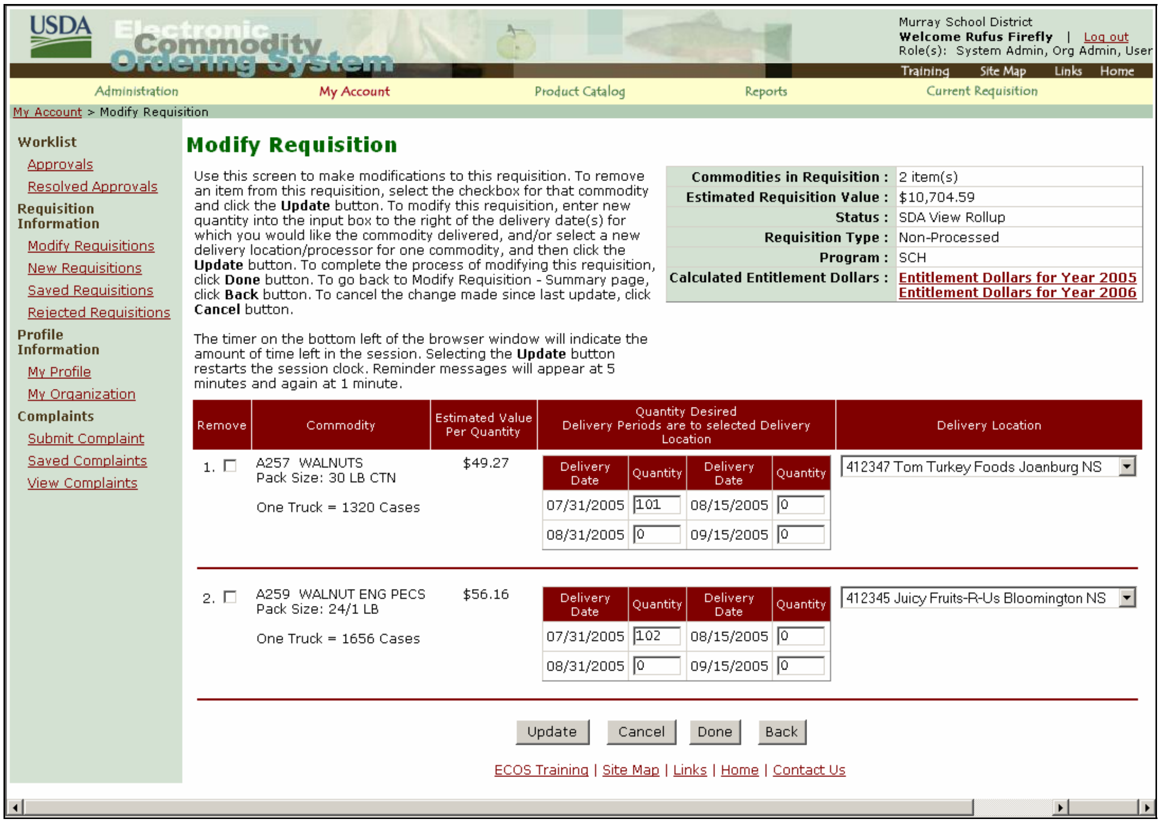


Figure VI-37: Modify Requisition (Modify Quantities)

To remove a commodity, select the commodity to be removed by clicking the selection box for that commodity under the Remove column (as shown in *Figure VI–38: Modify Requisition (Remove Selection Box)*).

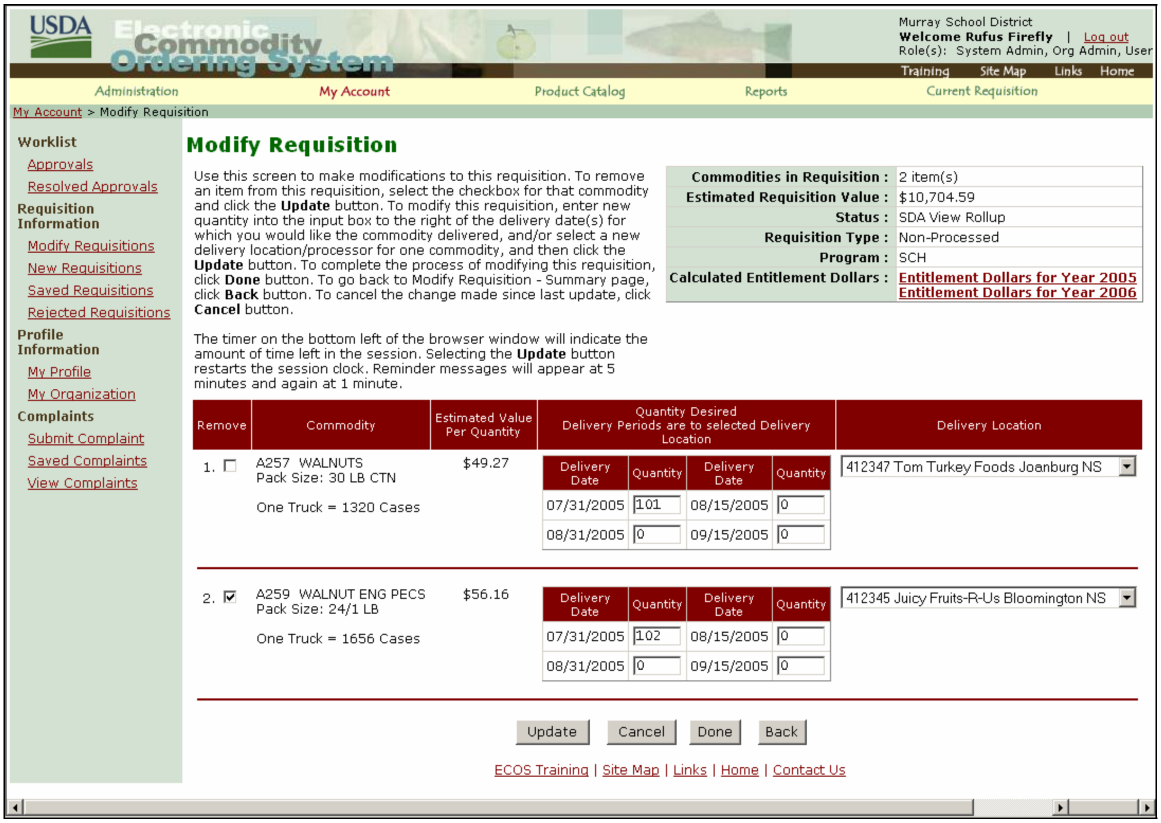


Figure VI-38: Modify Requisition (Remove Selection Box)

Then click the **Update** button. The Modify Requisition page will redisplay with the selected commodity removed (as shown in *Figure VI–39: Modify Requisition (Commodity Removed)*).

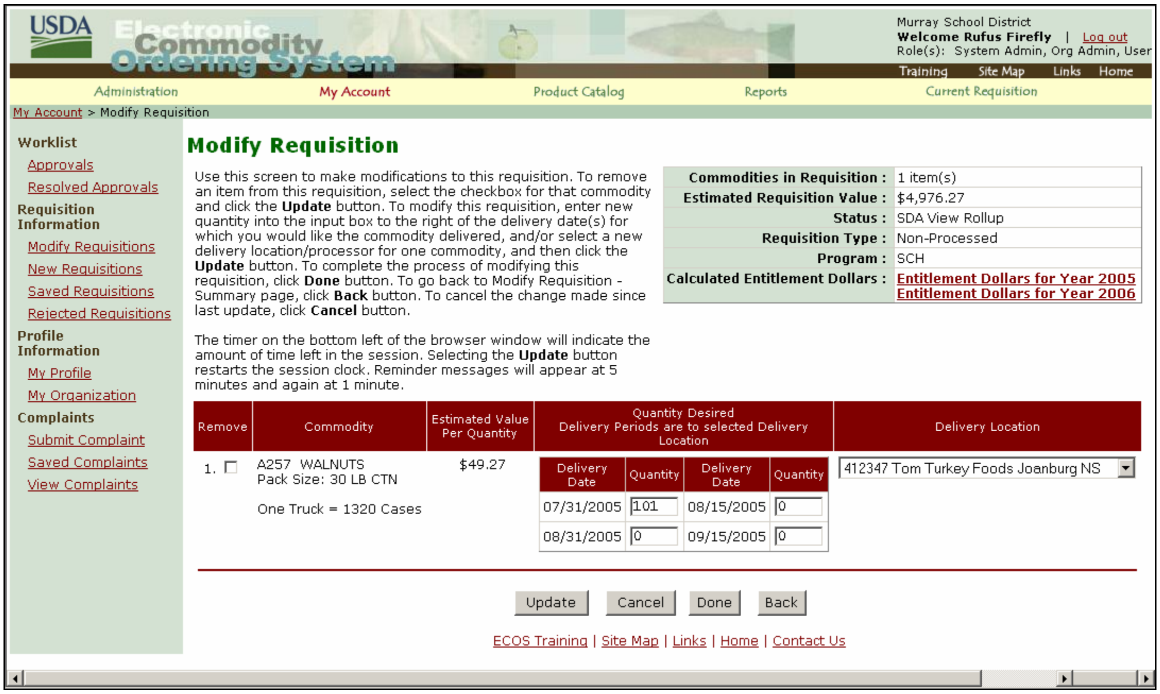


Figure VI-39: Modify Requisition (Commodity Removed)

To complete the modification process for this requisition, click the **Done** button. Clicking the **Done** button sends an e-mail to the Org Admins for this organization detailing the change. The Modify Requisition Completed page displays (as shown in *Figure VI–40: Modify Requisition Completed*).

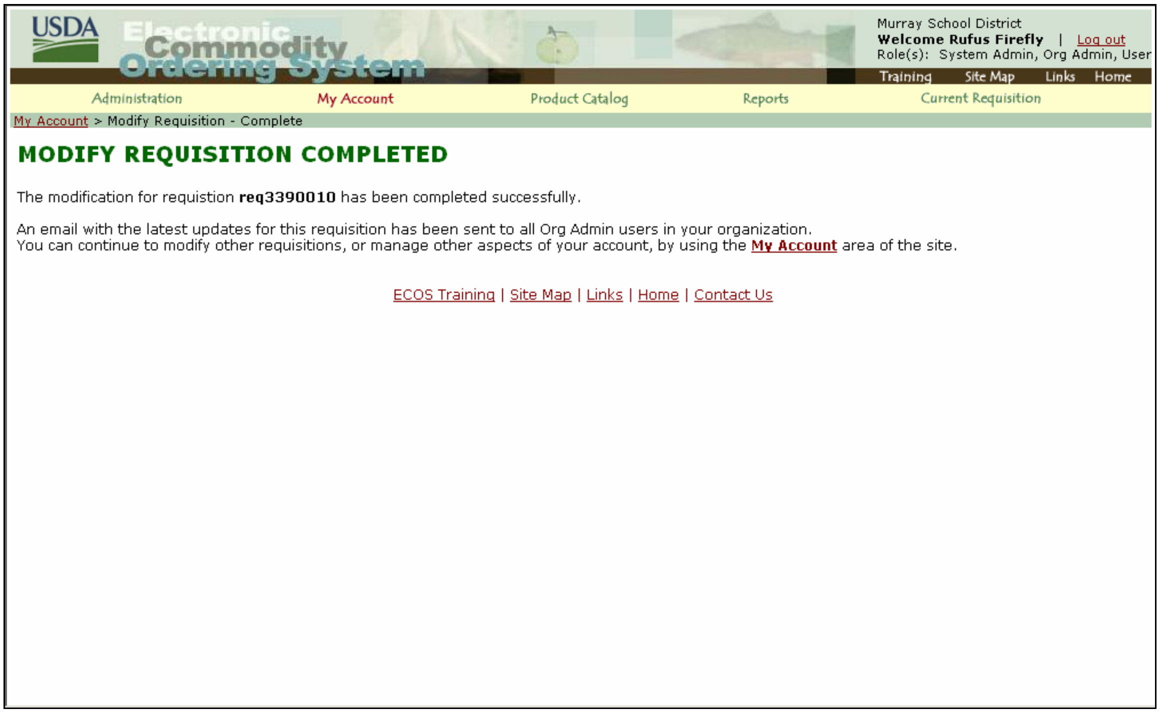


Figure VI-40: Modify Requisition Completed

To modify additional requisitions, return to the My Account page by clicking the **My Account** link provided on the Modify Requisition Completed page.

D. Requisition Approval Process

The requisition approval process allows an Org Admin to review requisitions before they are sent to the SA for rollup into full truckloads and order submission to USDA. If the Org Admin approves a requisition, it is then sent to the SA. Rejected requisitions are sent back to the user who placed them for revising. This is an optional process within ECOS. Assigning an Approver to a user is all it takes to initiate the approval process (refer to *Section IV.C Creating Users* or *Section IV.D Viewing/Editing Users*).

Once an Approver is assigned to a user, all of the user's requisitions will be subject to the approval process. ECOS allows you to assign a purchase limit to a user so that only requisitions that exceed the designated purchase limit will be subject to the approval process. A requisition whose estimated value is below the purchase limit is sent straight to the SA without review. To review all requisitions that are placed, you need to set the user's purchase limit to zero. Only Sys Admins can assign Approvers and set purchase limits for users (refer to *Sections IV.C Creating Users*, *IV.D.1 Edit Another User's Profile Information*, and *IV.F Creating New Administrators).*

When a requisition is sent to you for review, you will receive an e-mail notification. Another way to determine whether you have any requisitions that need to be reviewed is by accessing your My Account page. In the Information Area of that page, there is a

Notifications section. The first line of that section will show the number of requisitions awaiting your approval (refer to *Figure VI–32: My Account*).

To review a requisition, click the **Approvals** link located to the right on that same line under the heading "Activity," or click the **Approvals** link in the Worklist. Both links display the Approvals page (as shown in *Figure VI–41: Approvals*).

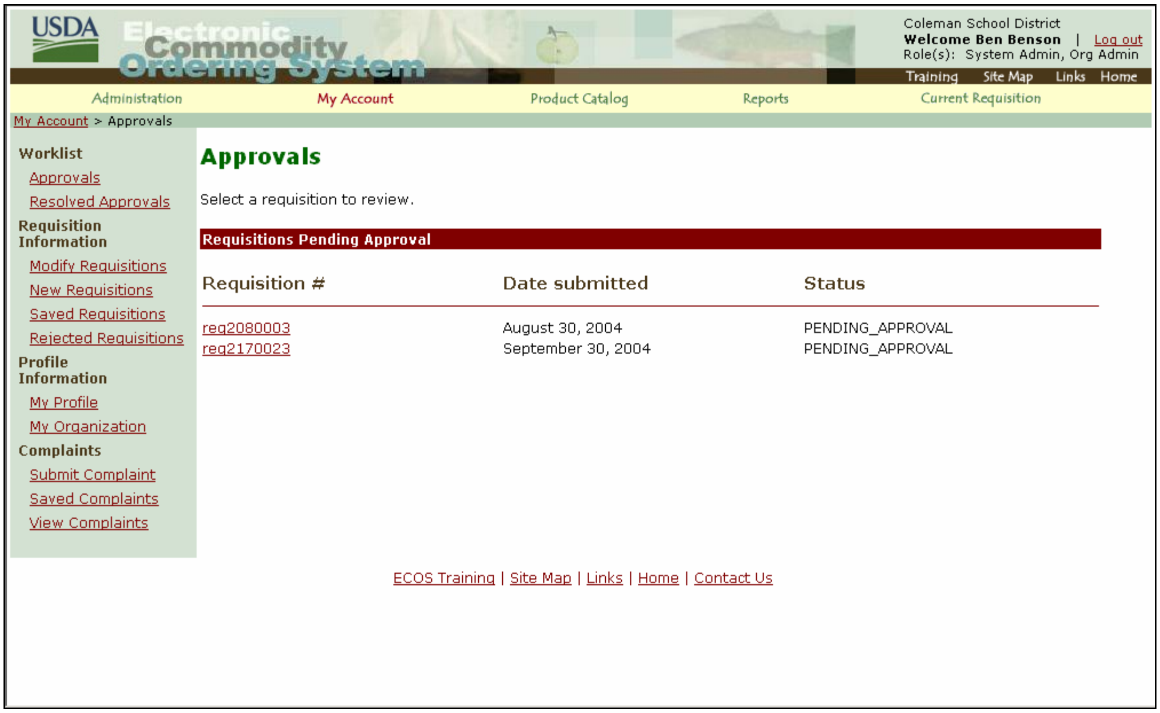


Figure VI-41: Approvals

Click the **requisition number** link for the requisition you wish to review. The Requisition Review page displays, providing information for the requisition number you selected (as shown in *Figure VI–42: Requisition Review*). **Note:** Comments from the user who placed the requisition can be found in the Comments section for each commodity on the requisition.

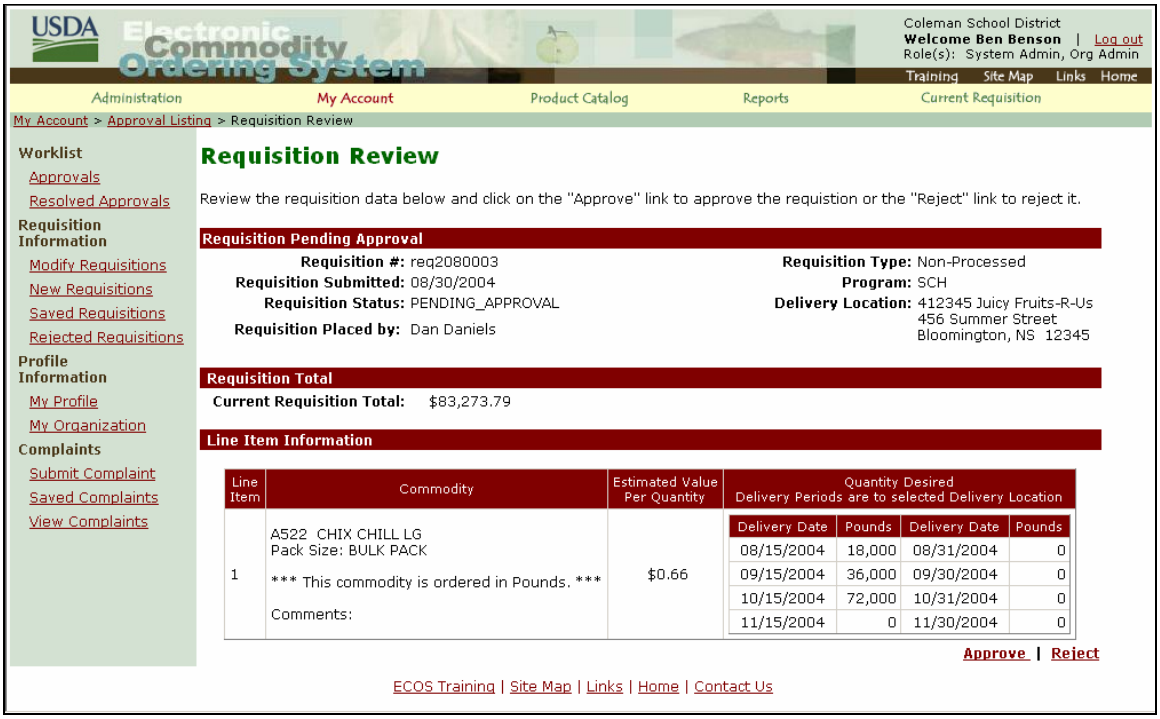


Figure VI-42: Requisition Review

After you review the requisition, you will need to approve or reject it by clicking either the **Approve** or **Reject** link on the bottom right-hand corner of the page.

1. Approving a Requisition (Org Admin)

Clicking the **Approve** link will display the Approve page, where you can enter a message to the user who placed the approved requisition (as shown in *Figure VI–43: Approve*).

Figure VI-43: Approve

Click the **Send** button to finish the approval process. The Confirmation page displays, with a message that the requisition has been approved. **Note:** ECOS automatically sends an e-mail notification to the user who originally placed the requisition.

When reviewing multiple requisitions, use the **Back** button on the Confirmation page to access the Approvals page where you can select the next requisition you wish to review. **Note:** To view requisitions that you have already approved or rejected, click the **Resolved Approvals** link on the My Account page.

2. Rejecting a Requisition (Org Admin)

Clicking the **Reject** link will display the Reject page, where you can enter a message to the user who placed the rejected requisition (as shown in *Figure VI–44: Reject*).

Figure VI-44: Reject

Click the **Send** button to complete the rejection process. The Confirmation page displays, with a message that the requisition has been rejected. **Note:** ECOS automatically sends an e-mail notification to the user who originally placed the requisition.

When reviewing multiple requisitions, use the **Back** button on the Confirmation page to access the Approvals page where you can select the next requisition you wish to review. **Note:** To view requisitions that you have already approved or rejected, click the **Resolved Approvals** link on the My Account page.

3. Viewing Rejected Requisitions (Org Admin and User)

On the My Account page (refer to *Figure VI–32: My Account*), click the **Rejected Requisitions** link to view any requisitions that have been rejected by your approver and returned to you for revision (as shown in *Figure VI–45: Rejected Requisitions*).

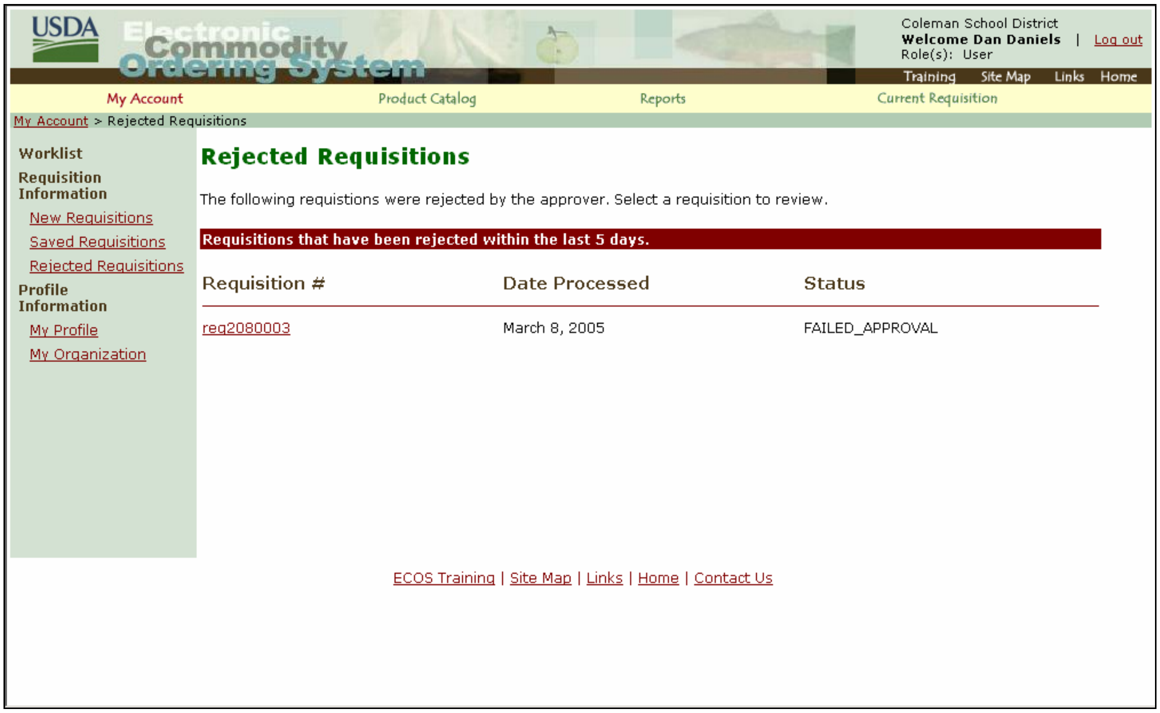


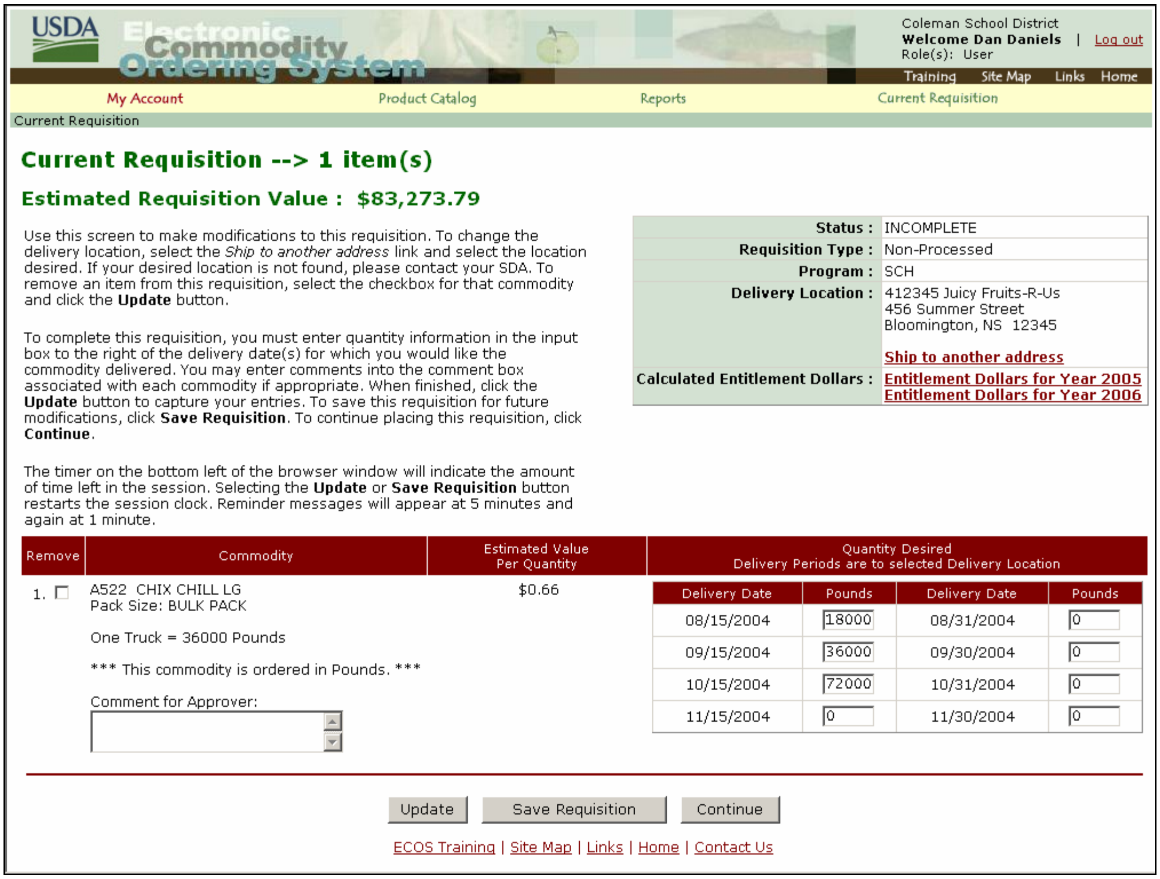
Figure VI-45: Rejected Requisitions

Click the **<u>Requisition #</u>** link you wish to view. The page displays, showing all the information for the rejected requisition (as shown in *Figure VI–46: Requisition Review*).

Figure VI-46: Requisition Review

You can review the rejection comments in the Approver Information section of the Requisition Review page. To delete the requisition, click the **Delete Requisition** button at the bottom of the page. A deletion confirmation page will display. Click the **Yes** button to confirm that you want to delete the requisition.

To make edits to the requisition and resubmit it for approval, click the **Edit Requisition** button. The requisition displays as your current requisition (as shown in *Figure VI–47: Current Requisition*).



USDA Electronic Commodity Ordering System

Coleman School District
Welcome Dan Daniels | Log out
Role(s): User

Training | Site Map | Links | Home

My Account | Product Catalog | Reports | Current Requisition

Current Requisition

Current Requisition --> 1 item(s)

Estimated Requisition Value : $83,273.79

Use this screen to make modifications to this requisition. To change the delivery location, select the *Ship to another address* link and select the location desired. If your desired location is not found, please contact your SDA. To remove an item from this requisition, select the checkbox for that commodity and click the **Update** button.

To complete this requisition, you must enter quantity information in the input box to the right of the delivery date(s) for which you would like the commodity delivered. You may enter comments into the comment box associated with each commodity if appropriate. When finished, click the **Update** button to capture your entries. To save this requisition for future modifications, click **Save Requisition**. To continue placing this requisition, click **Continue**.

The timer on the bottom left of the browser window will indicate the amount of time left in the session. Selecting the **Update** or **Save Requisition** button restarts the session clock. Reminder messages will appear at 5 minutes and again at 1 minute.

Status :	INCOMPLETE
Requisition Type :	Non-Processed
Program :	SCH
Delivery Location :	412345 Juicy Fruits-R-Us 456 Summer Street Bloomington, NS 12345 Ship to another address
Calculated Entitlement Dollars :	Entitlement Dollars for Year 2005 Entitlement Dollars for Year 2006

Remove	Commodity	Estimated Value Per Quantity	Quantity Desired Delivery Periods are to selected Delivery Location
1. ☐	A522 CHIX CHILL LG Pack Size: BULK PACK One Truck = 36000 Pounds *** This commodity is ordered in Pounds. *** Comment for Approver:	$0.66	

Delivery Date	Pounds	Delivery Date	Pounds
08/15/2004	18000	08/31/2004	0
09/15/2004	36000	09/30/2004	0
10/15/2004	72000	10/31/2004	0
11/15/2004	0	11/30/2004	0

Update | Save Requisition | Continue

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Figure VI-47: Current Requisition

Make the necessary changes to the requisition and resubmit it to your approver.

VII. LINKS

A. Overview

The Links functionality allows an Org Admin user to create customized links to web sites outside of ECOS. All users, regardless of their user type, can execute a customized link. Created links are displayed on the Links page and are accessible to all users within an organization, regardless of their role.

B. View Links

Customized links can be accessed in various ways. Below are three different ways to access these links:

- Clicking the **Links** option on the Reference Bar
- Clicking the **View/Edit Recipient Agency Profile** link on the Administration page
- Clicking the **Links** option on the Footer Link

To access an existing link using the **Links** option on the Reference Bar, follow the steps below:

1. Click the **Links** option on the Reference Bar (refer to *Figure III–6: ECOS Homepage*). The Links page displays (as shown in *Figure VII–1: Links*).

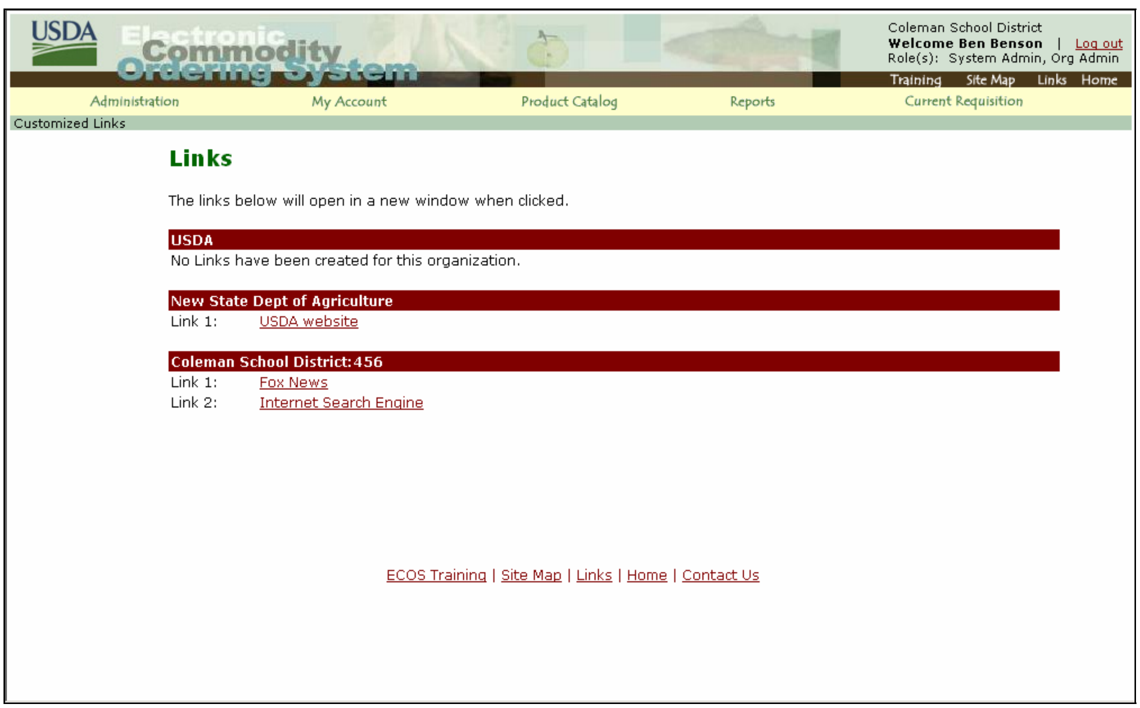


Figure VII–1: Links

2. Click the desired link. When a user clicks on a valid link, a new window opens and the new web site displays. If the link is no longer valid, the window displays an error message.

To access an existing link using the **View/Edit Recipient Agency Profile** link, follow the steps below:

1. Click the **Administration** link on the ECOS menu bar. This is an Org Admin only role.
2. Click the **View/Edit Recipient Agency Profile** link under the Organization section on the Administration page. The View RA Profile page displays.
3. Scroll down to the bottom of the View RA Profile page and click the desired link under the Customized Links section. When a user clicks on a valid link, a new window opens and the new web site displays. If the link is no longer valid, the window displays an error message.

To access an existing link using the **Links** Footer Link, follow the steps below:

1. Click the **Links** Footer Link. The Links page displays (refer to *Figure VII–1: Links*).
2. Click the desired link. When a user clicks on a valid link, a new window opens and the new web site displays. If the link is no longer valid, the window displays an error message.

C. Create Links (Org Admin)

You can create new links to other web sites. To create new links, click the **Create New Link** link, which takes you to the Create New Link page (as shown in *Figure VII–2: Create New RA Link*). In the Title field, enter a name for your new link. Type in the URL address in the URL field and click the **Save** button. The link is now listed under the Customized Links area by its title. **Note**: Any links that are created here will be available to everyone in your organization.

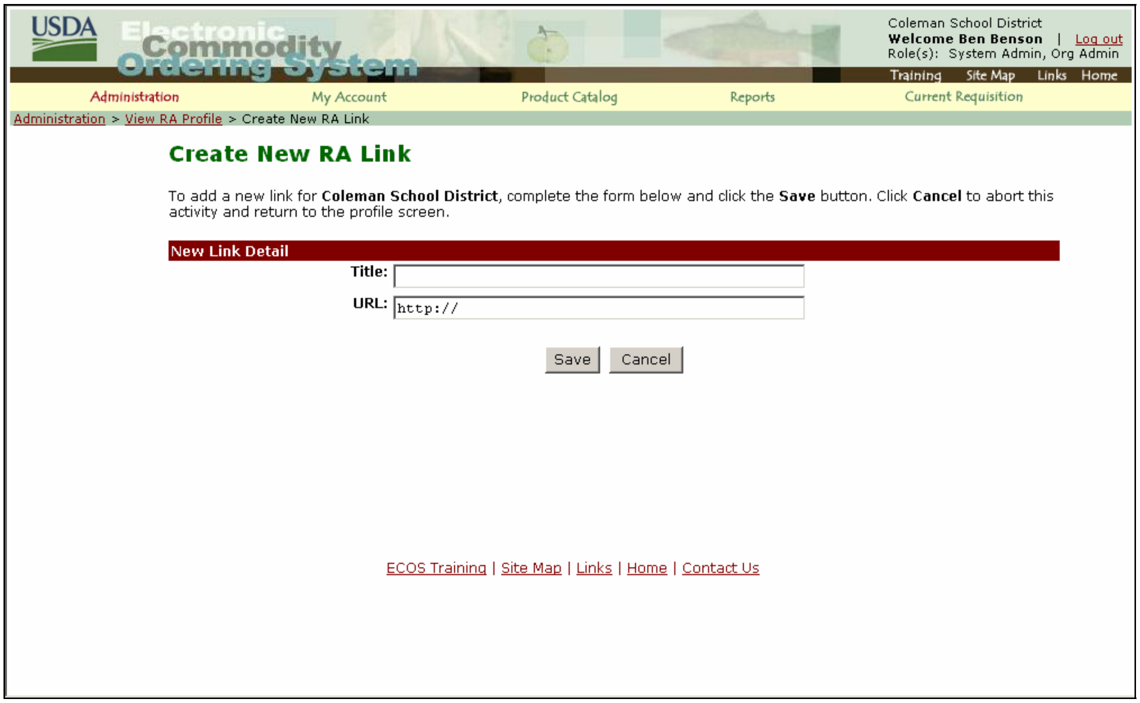


Figure VII–2: Create New RA Link

If you do *not* wish to create a link after taking these steps, click the **Cancel** button to return to the View Receiver Profile page.

D. Edit Links (Org Admin)

Once new links are created, two options for the Customized Links section will automatically appear: Edit and Delete. To edit the link, click **Edit**, which takes you to the Edit Link page (as shown in *Figure VII–3: Edit RA Link*). You can then change the title and/or the URL address. Click the **Save** button, and you will be returned to the View Receiver Profile page. **Note:** Since only titles are displayed on the View Receiver Profile page, the only viewable change from this page would be the one you made to your title.

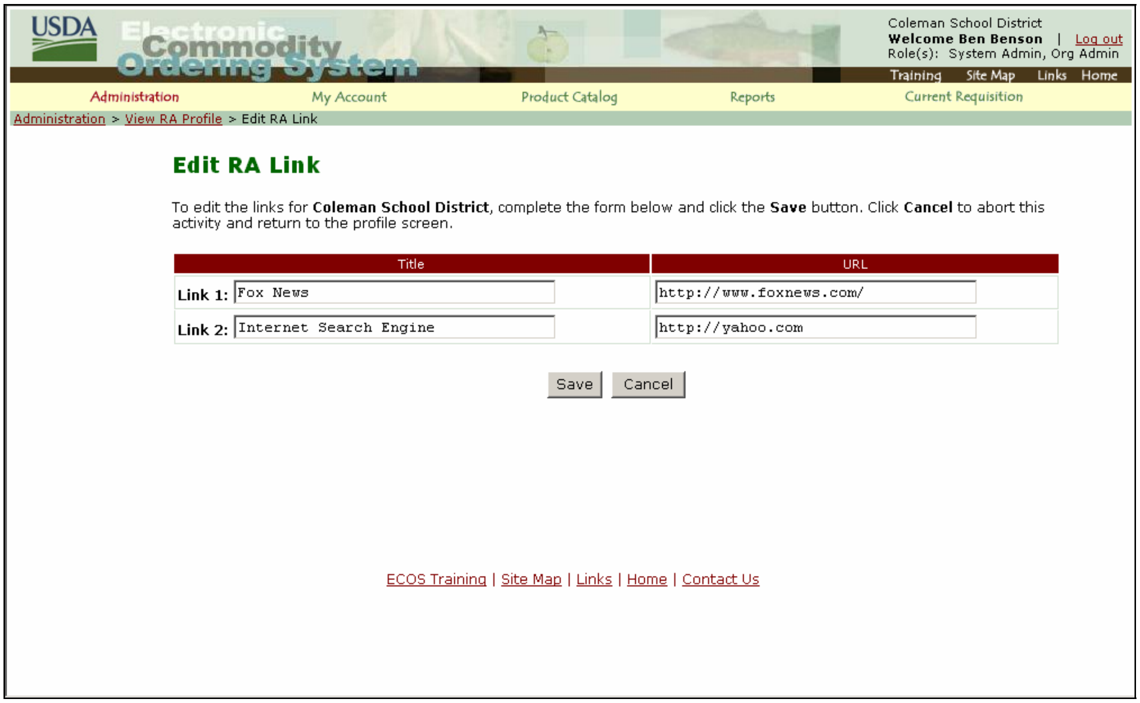


Figure VII–3: Edit RA Link

If you do *not* wish to edit a link after taking these steps, click the **Cancel** button to return to the View Receiver Profile page.

E. Delete Links (Org Admin)

To Delete a link, scroll down to the bottom of the View RA Profile page and click on the **Delete** link under the Customized Links bar. This takes you to the Delete Link page. Select the link you want to delete by clicking the selection box next to the link's name (as shown in *Figure VII–4: Delete RA Link)*, and then click the **Delete** button. You will then be returned to the View Receiver Profile page. The deleted link will no longer be listed under Customized Links.

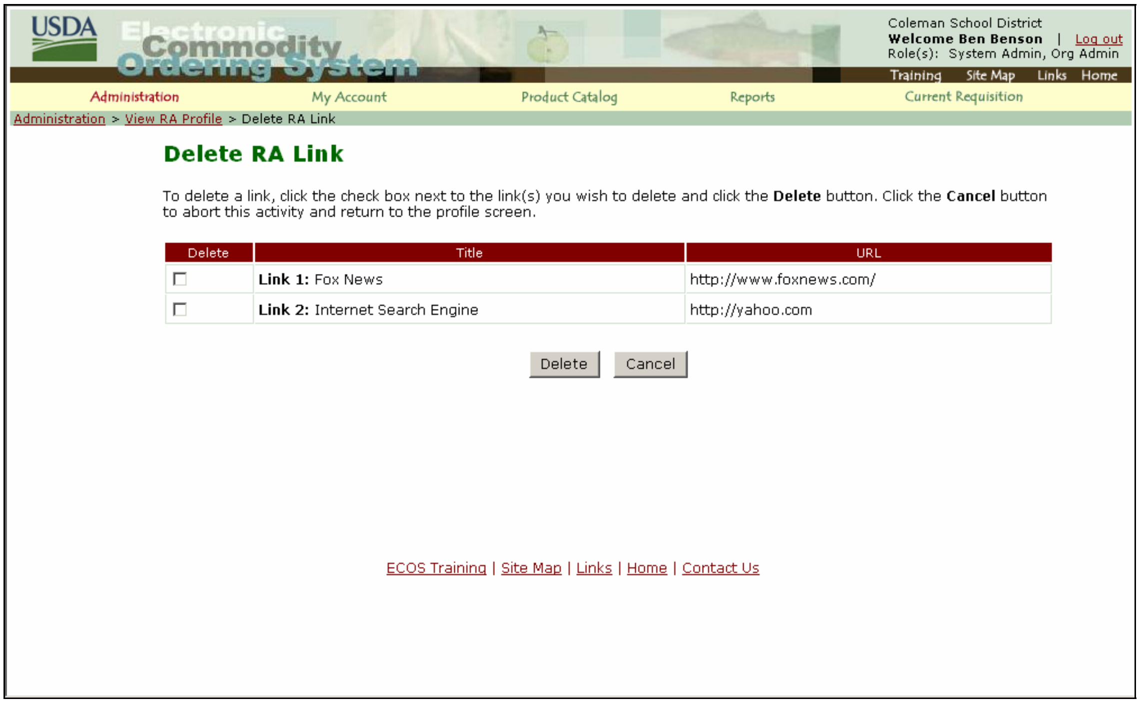


Figure VII–4: Delete RA Link

If you do *not* wish to delete a link after taking these steps, click the **Cancel** button to return to the View Receiver Profile page.

VIII. MESSAGING

A. Overview

The Messaging functionality allows an Org Admin to create a broadcast message. The created message displays on each user's Homepage within an organization, regardless of his or her role. Only the Org Admin has the ability to edit or delete a message.

B. Create New Broadcast Message (Org Admin)

To create a broadcast message, follow the steps below:

1. Click the **Create New Broadcast Message** link on the Administration page. The Create New Broadcast Message page displays (as shown in *Figure VIII–1: Create New Broadcast Message*).

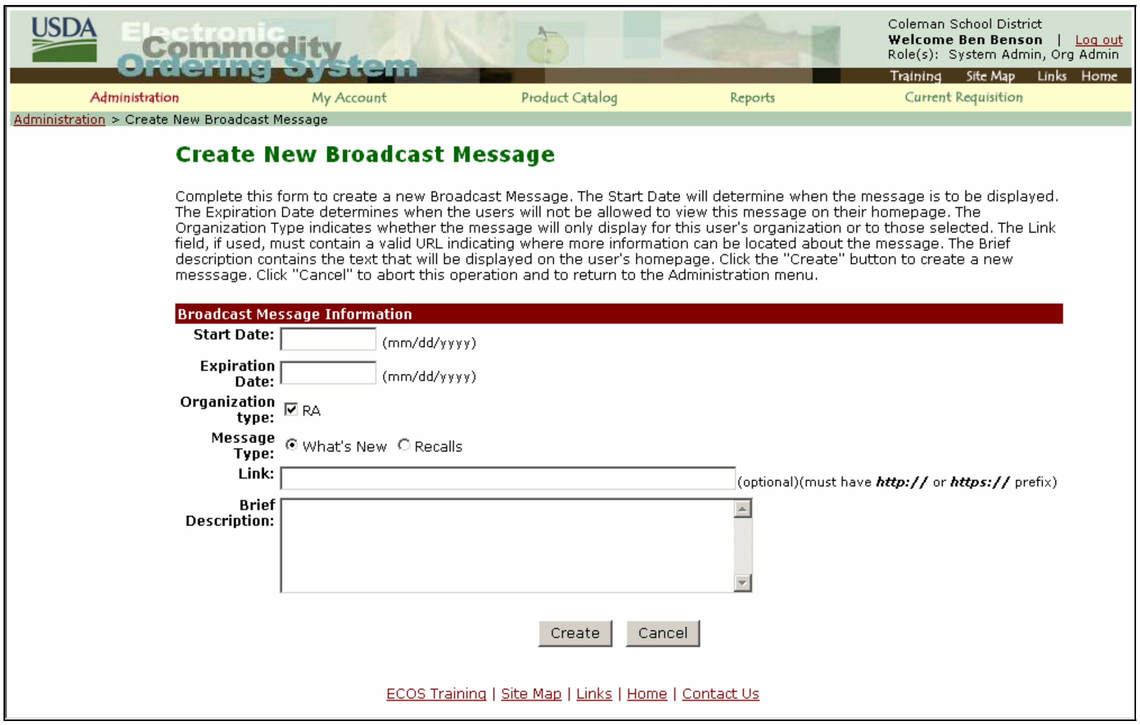


Figure VIII–1: Create New Broadcast Message

2. Enter the start date in the Start Date field where this broadcast message is to be displayed. The start date cannot be earlier than the message current date but it can be later. The date format is mm/dd/yyyy (example: 12/31/2004).

3. Enter the expiration date in the Expiration Date field that this broadcast message is no longer to be displayed. The date format is mm/dd/yyyy (example: 12/31/2004). The end date cannot be earlier than the message start date.

4. Click the desired Organization Type that this broadcast message will display for. "RA" is the only organization type available for RA-level users.

5. Click the desired Message Type. If the **What's New** radio button is selected, then the message will display under the green What's New subheading on the Homepage. If the **Recalls** radio button is selected, then the message displays under the green Recalls subheading on the Homepage (as shown in *Figure VIII–2: Homepage*). Only one radio button can be selected.

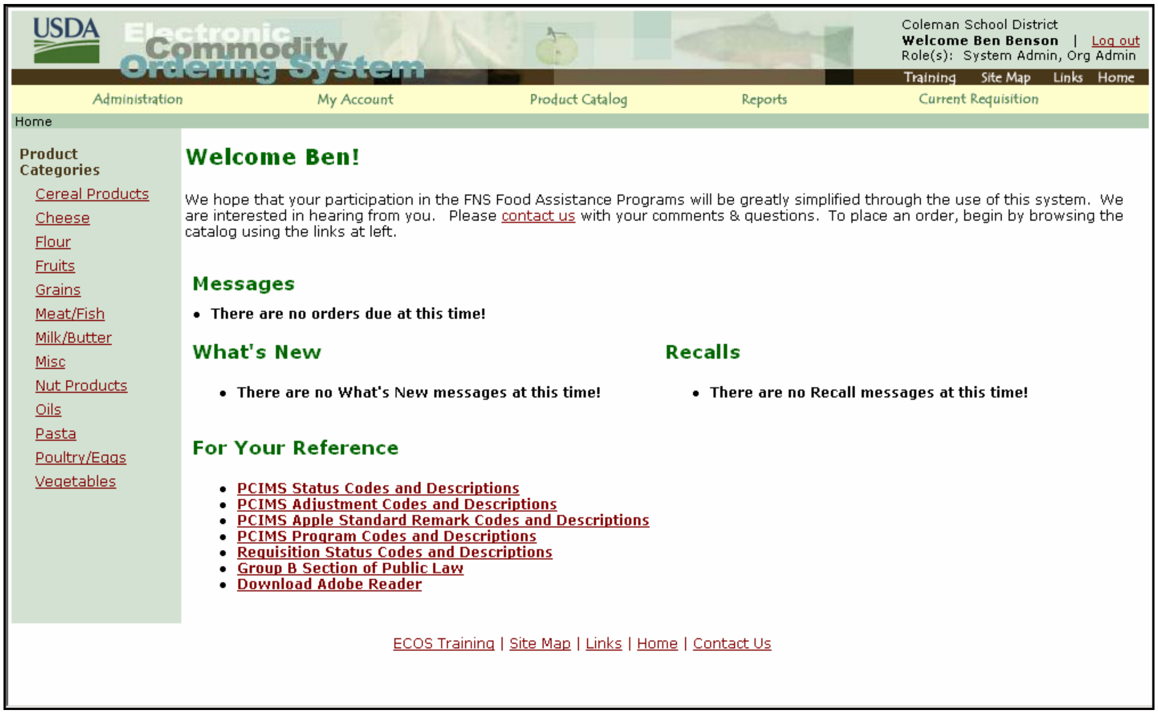


Figure VIII–2: Homepage

6. The Link field is optional. If used, it must contain a valid URL indicating where more information about the message can be located.

7. Enter the message in the Brief Description field. This message displays on the user's Homepage.

8. Click the **Create** button after the broadcast information has been entered and verified. The Create New Broadcast Message – Completed page displays (as shown in *Figure VIII–3: Create New Broadcast Message – Completed*).

Figure VIII–3: Create New Broadcast Message - Completed

9. Click the **Done** button; the Administration page displays (as shown in *Figure VIII–4: Administration*).

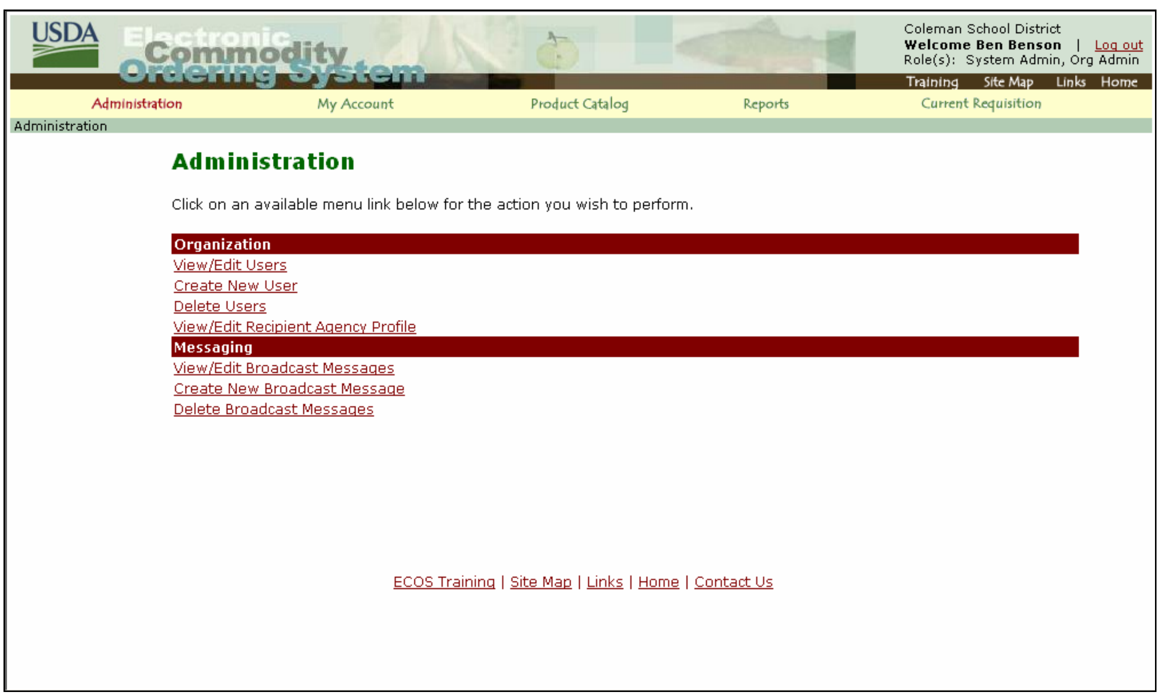


Figure VIII–4: Administration

C. Edit Broadcast Message (Org Admin)

To edit a broadcast message, follow the steps below:

1. To display the View/Edit Broadcast Messages page, click the **View/Edit Broadcast Messages** link on the Administration page. The View/Edit Broadcast Messages page displays (as shown in *Figure VIII–5: View/Edit Broadcast Messages*). Editable messages are listed.

Figure VIII–5: View/Edit Broadcast Messages

2. To select a message to edit, click the desired message listed under the Message Description bar. The Edit Broadcast Message page displays (as shown in *Figure VIII–6: Edit Broadcast Message*).

Figure VIII–6: Edit Broadcast Message

3. Make the desired changes to the dates, message type, link, and/or description. When finished editing the message, click the **Save** button. The View/Edit Broadcast Messages page displays again. The user can either select another message to edit or click another option in the menu bars or the **Back** button to return to the Administration page.

D. Delete Broadcast Messages (Org Admin)

To delete broadcast messages, follow the steps below:

4. To display the Delete Broadcast Message(s) page, click the Delete Broadcast **Messages** link on the Administration page. The Delete Broadcast Message(s) page displays available messages (as shown in *Figure VIII–7: Delete Broadcast Message(s)*).

Figure VIII–7: Delete Broadcast Message(s)

5. To select a message or messages to delete, click the empty selection Delete box under the Delete column next to the desired message.
6. To start the deletion process, click the **Delete** button. The Confirm Delete Broadcast Message(s) page displays with the message (as shown in *Figure VIII–8: Confirm Delete Broadcast Message(s)*).

Figure VIII–8: Confirm Delete Broadcast Message(s)

7. To complete the deletion process, click the **OK** button. If you do *not* wish to delete the message listed, click the **Cancel** button. The Administration page displays.

IX. REPORTS

A. Overview

The Reports page provides access to ECOS reporting capabilities. The different reports available are listed under Reports on the left side of the page (as shown in *Figure VI–1: Reports*). All users have access to the Commodity File report, but the Security Listing report is accessible to Administrators only. The Shipment Notification report is only available to user roles at the Plant/Warehouse. The system allows you to customize your report request to scale down the amount of information that is returned in your report.

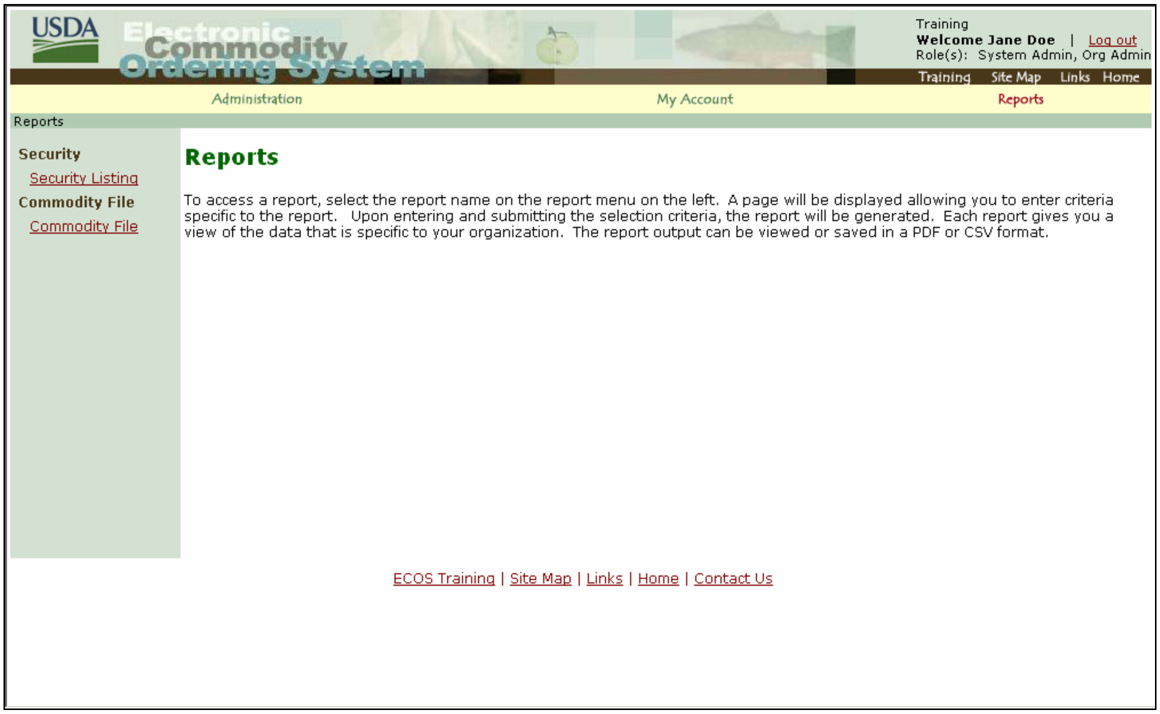


Figure IX–1: Reports

B. Requesting a Report

The following is an overview of the report request process. More detailed instructions are provided in subsequent sections of this manual.

1. Select a Report

From the Reports page, select the report you wish to generate by clicking the link in the Reports List. The Commodity File report is used as an example (as shown in *Figure VI–2: Commodity File Report Request*).

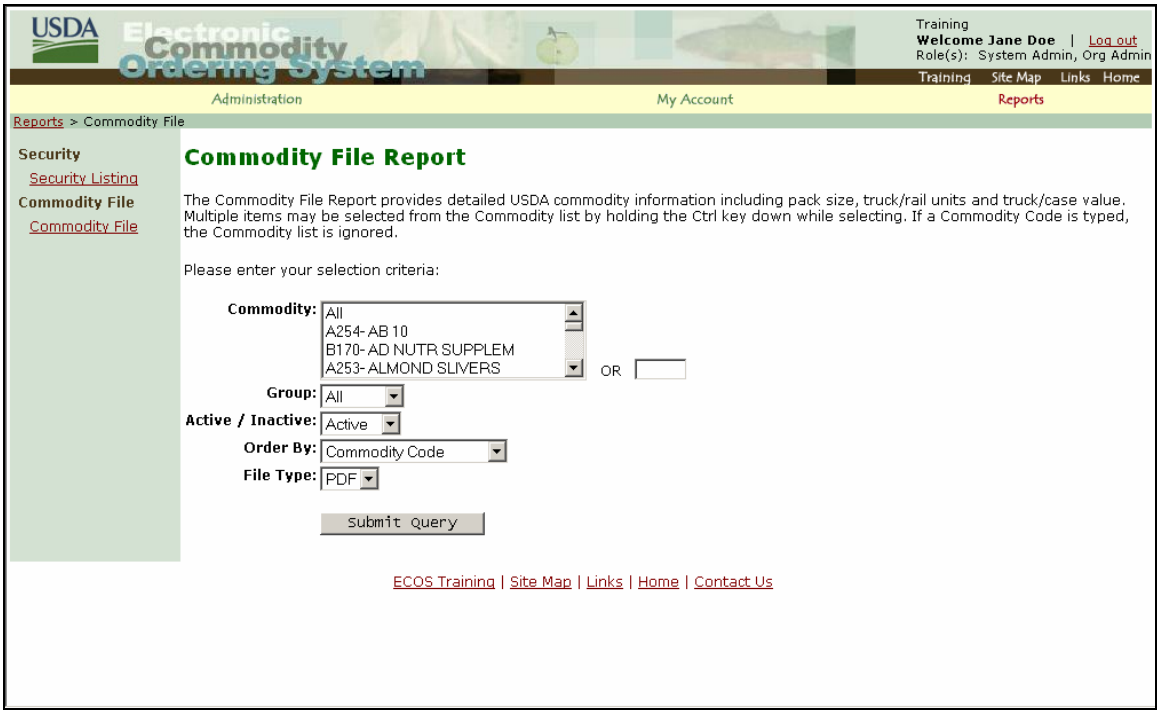


Figure IX–2: Commodity File Report Request

2. Enter Selection Criteria

Enter any selection criteria you wish to narrow down the scope of your report, including the File Type (refer to *Figure VI–2: Commodity File Report Request*), which is a selection criterion that is common to all report requests.

The File Type allows you to select the format in which the report is produced. There are two formats available in ECOS, described below. The default format is Portable Document Format (PDF).

- **PDF**—Provides you with a preformatted report and displays on your screen using Adobe Acrobat Reader.
- **Comma-separated Values (CSV)**—Produces a report that can be opened as a spreadsheet. This allows you to customize your report.

After you enter your desired criteria, click the **Submit Query** button. A new page displays, with a message informing you that your report was successfully generated (as shown in *Figure VI–3: Your Report Has Been Successfully Generated*).

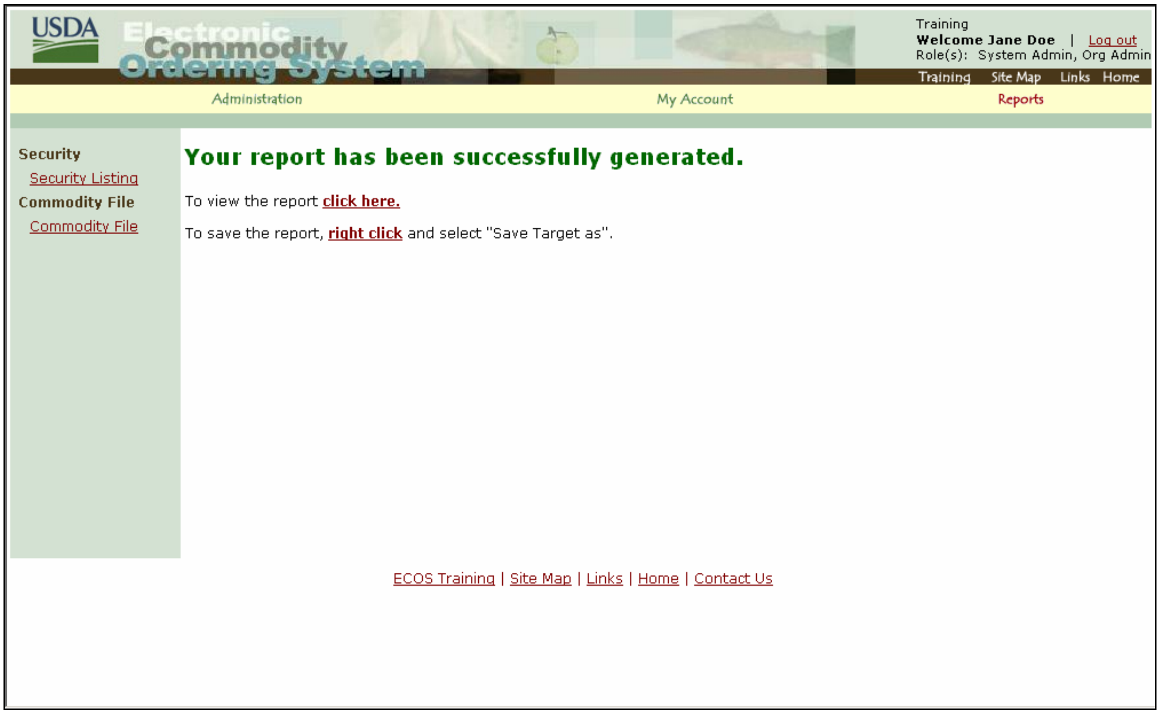


Figure IX–3: Your Report Has Been Successfully Generated

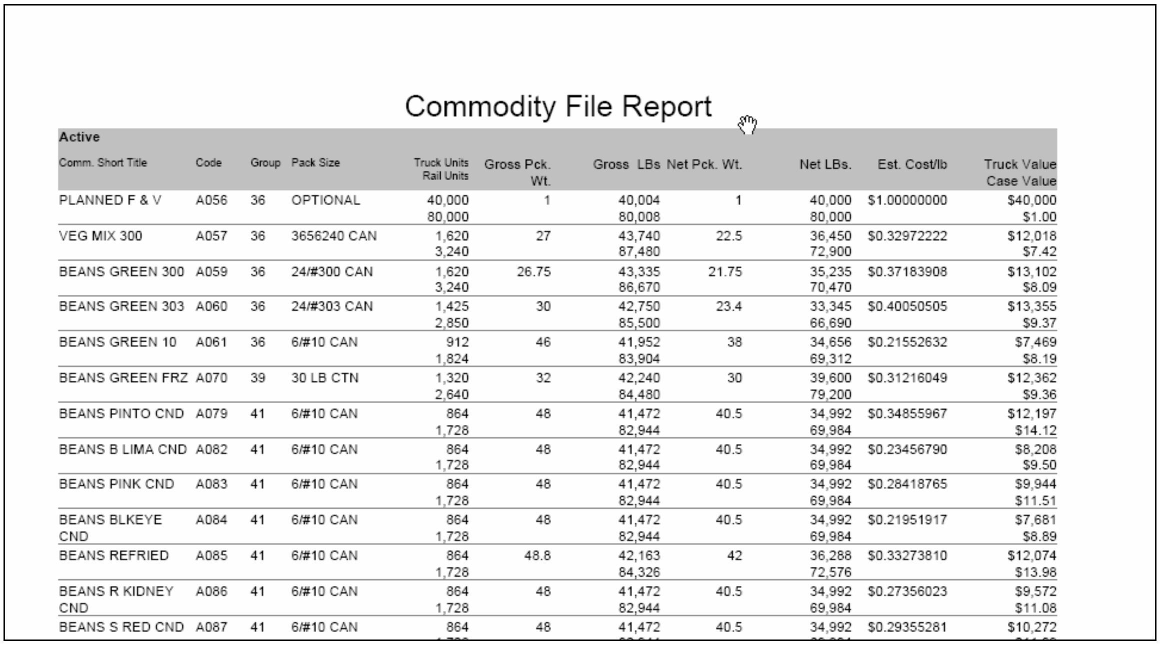
If a new page does not display, a warning message displays advising that there was no information to report for the criteria you selected, or that the selection criteria was entered incorrectly. On the "Your report has been successfully generated" page, you have two options to choose from in your work area, depending on the file type that you request—PDF or CSV.

3. Accessing Reports in PDF File Format

When you request a report in PDF file format, you have two options—**click here** and **right click** (as shown in *Figure VI–3: Commodity File Successfully Generated*). Both of these options are described below.

- **Click Here**—Opens a new dialog window to view the report. If this is the first time you are generating an ECOS report since you logged onto your computer, the system displays a dialog window indicating that Adobe Acrobat software is being accessed.

  Once that process completes, the report displays in the new window (as shown in *Figure VI–4: PDF – Commodity File Report*) and you can scroll through the report. The information on this report is "Read Only" and cannot be changed, unlike the CSV file format which allows information to be edited after the report has been generated.



Commodity File Report

Active										
Comm. Short Title	Code	Group	Pack Size	Truck Units Rail Units	Gross Pck. Wt.	Gross LBs	Net Pck. Wt.	Net LBs.	Est. Cost/lb	Truck Value Case Value
PLANNED F & V	A056	36	OPTIONAL	40,000 80,000	1	40,004 80,008	1	40,000 80,000	$1.00000000	$40,000 $1.00
VEG MIX 300	A057	36	3656240 CAN	1,620 3,240	27	43,740 87,480	22.5	36,450 72,900	$0.32972222	$12,018 $7.42
BEANS GREEN 300	A059	36	24/#300 CAN	1,620 3,240	26.75	43,335 86,670	21.75	35,235 70,470	$0.37183908	$13,102 $8.09
BEANS GREEN 303	A060	36	24/#303 CAN	1,425 2,850	30	42,750 85,500	23.4	33,345 66,690	$0.40050505	$13,355 $9.37
BEANS GREEN 10	A061	36	6/#10 CAN	912 1,824	46	41,952 83,904	38	34,656 69,312	$0.21552632	$7,469 $8.19
BEANS GREEN FRZ	A070	39	30 LB CTN	1,320 2,640	32	42,240 84,480	30	39,600 79,200	$0.31216049	$12,362 $9.36
BEANS PINTO CND	A079	41	6/#10 CAN	864 1,728	48	41,472 82,944	40.5	34,992 69,984	$0.34855967	$12,197 $14.12
BEANS B LIMA CND	A082	41	6/#10 CAN	864 1,728	48	41,472 82,944	40.5	34,992 69,984	$0.23456790	$8,208 $9.50
BEANS PINK CND	A083	41	6/#10 CAN	864 1,728	48	41,472 82,944	40.5	34,992 69,984	$0.28418765	$9,944 $11.51
BEANS BLKEYE CND	A084	41	6/#10 CAN	864 1,728	48	41,472 82,944	40.5	34,992 69,984	$0.21951917	$7,681 $8.89
BEANS REFRIED	A085	41	6/#10 CAN	864 1,728	48.8	42,163 84,326	42	36,288 72,576	$0.33273810	$12,074 $13.98
BEANS R KIDNEY CND	A086	41	6/#10 CAN	864 1,728	48	41,472 82,944	40.5	34,992 69,984	$0.27356023	$9,572 $11.08
BEANS S RED CND	A087	41	6/#10 CAN	864	48	41,472	40.5	34,992	$0.29355281	$10,272

Figure IX–4: PDF – Commodity File Report

- **Right Click—**When you right click the **right click** link, a menu box displays (as shown in *Figure VI–5: PDF - Right Click Menu Box*). As stated in the on-screen instructions, click the **Save Target As…** option.

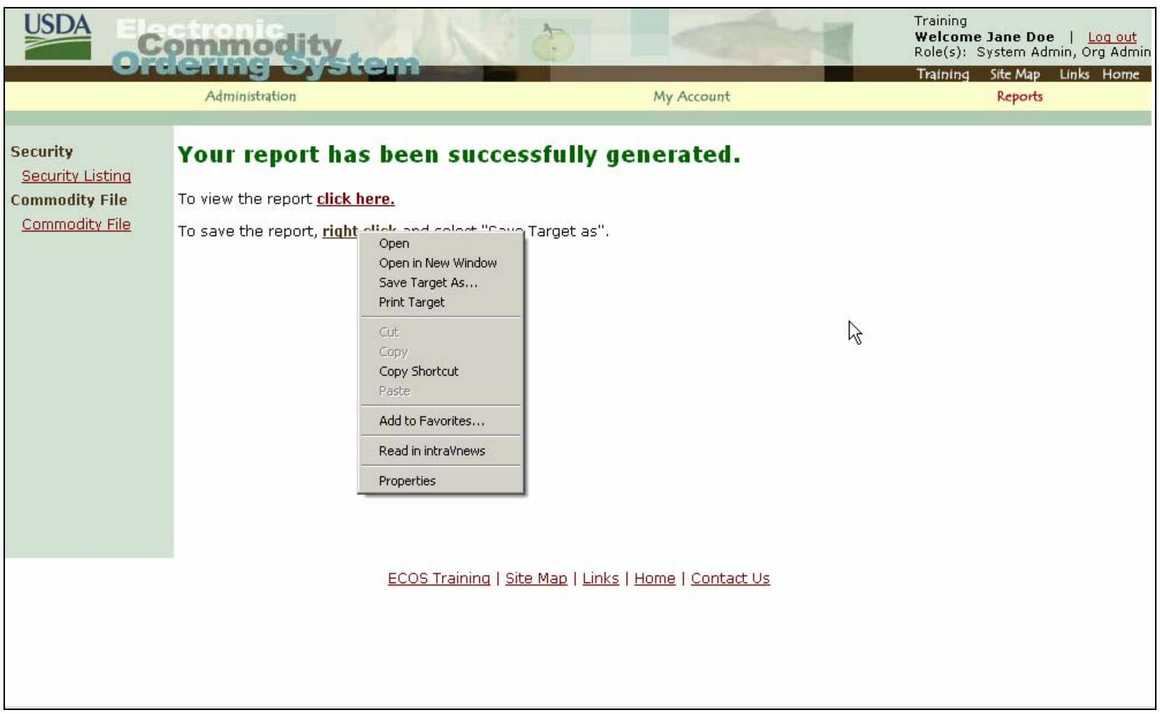


Figure IX–5: PDF - Right Click Menu Box

When you click the **Save Target As…** option, the "Save As" dialog box displays. At this point, you need to determine where you want to save the newly generated report by selecting a folder in the "Save in" field. After determining the location, specify the file name you want to use in the "File name" field and click the **Save** button. The Download Complete dialog box displays (as shown in *Figure VI–6: PDF - Download Complete Message*).

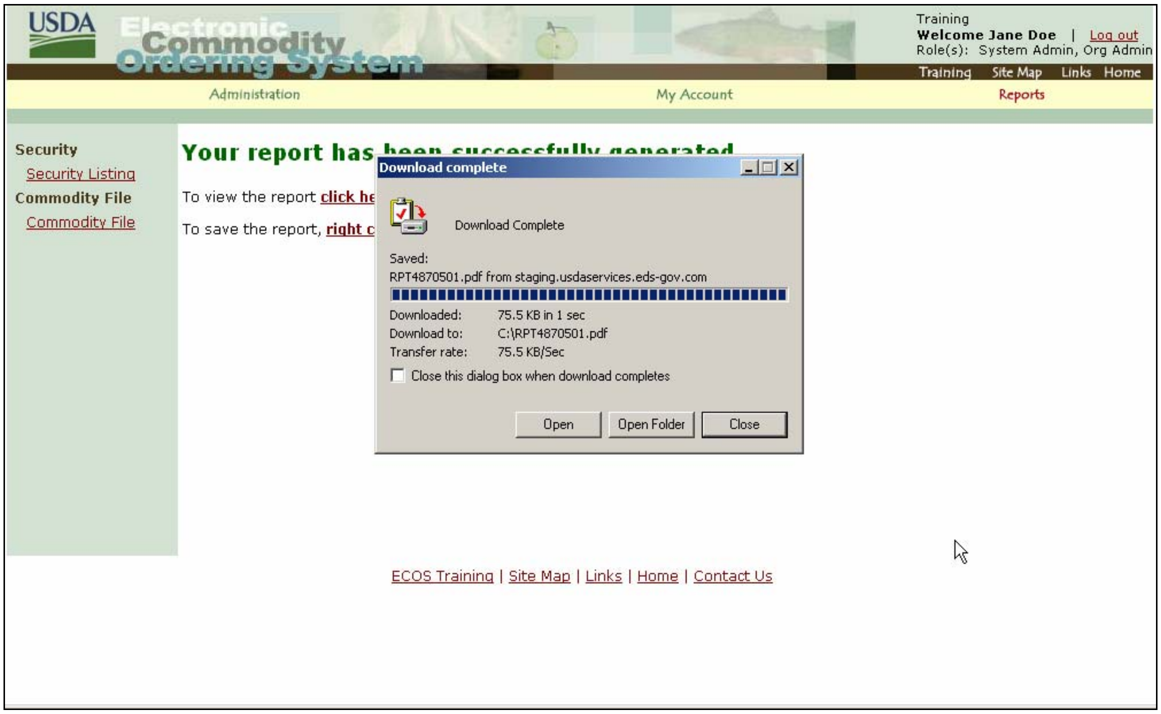


Figure IX–6: PDF - Download Complete Message

The Download Complete dialog box has three buttons:

- **Open**—Opens the report so you can view it.
- **Open Folder**—Opens the folder where this file is saved using Windows Explorer.
- **Close**—Closes the Download Complete dialog box while keeping your file saved in the location you indicated.

4. Accessing Reports in CSV File Format

If you request a report in CSV format, there is only one option—**right click** (as shown in *Figure VI–7: CSV File Successfully Generated*).

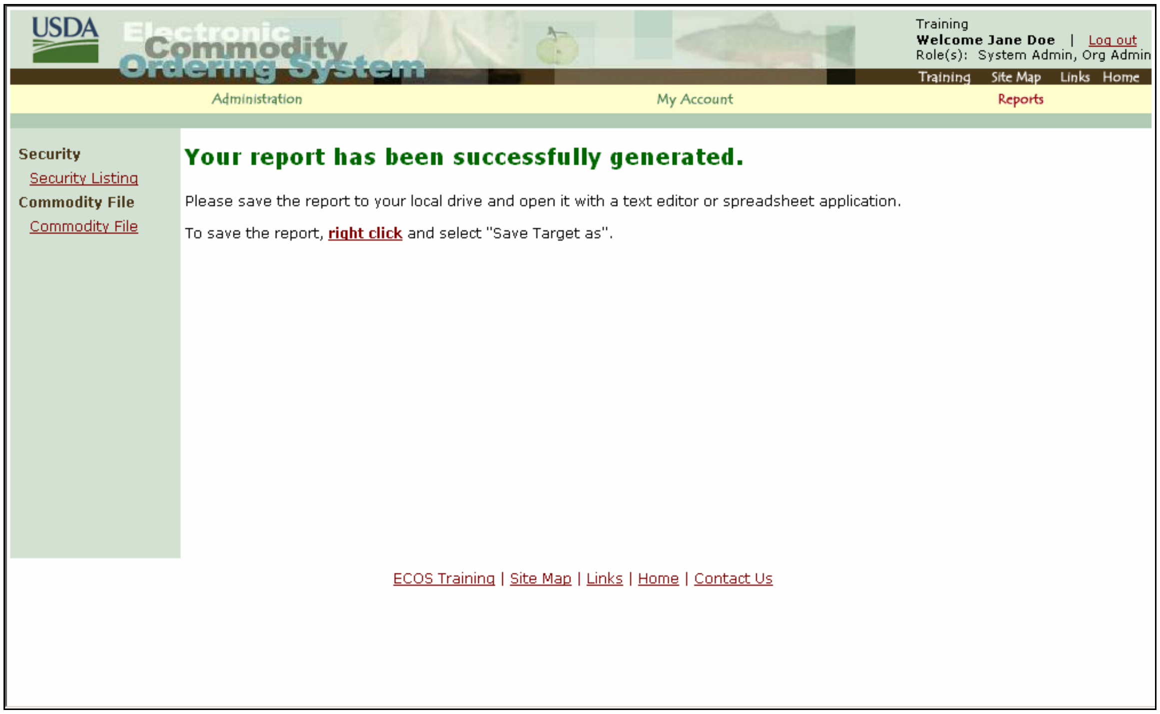


Figure IX–7: CSV File Successfully Generated

Right Click—When you right click the **right click** link, a menu box displays (as shown in *Figure VI–8: CSV – Right Click Menu Box*). As stated in the on-screen instructions, select the **Save Target As…** option.

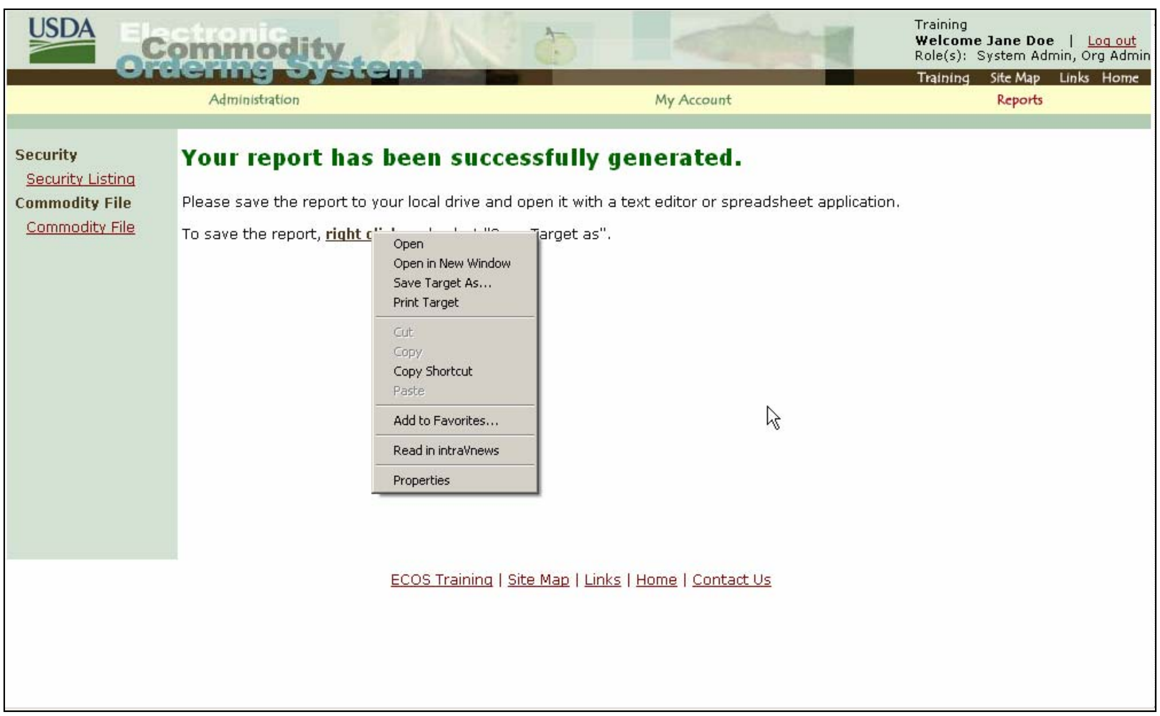


Figure IX–8: CSV - Right Click Menu Box

When you click the **Save Target As…** option, the “Save As” dialog box displays.

At this point, you need to determine where to save the newly generated report by selecting a folder in the “Save in” field. After determining the location, specify the file name you want to use in the “File name” field and click the **Save** button. The Download Complete dialog box displays (as shown in *Figure VI–9: CSV - Download Complete Message*).

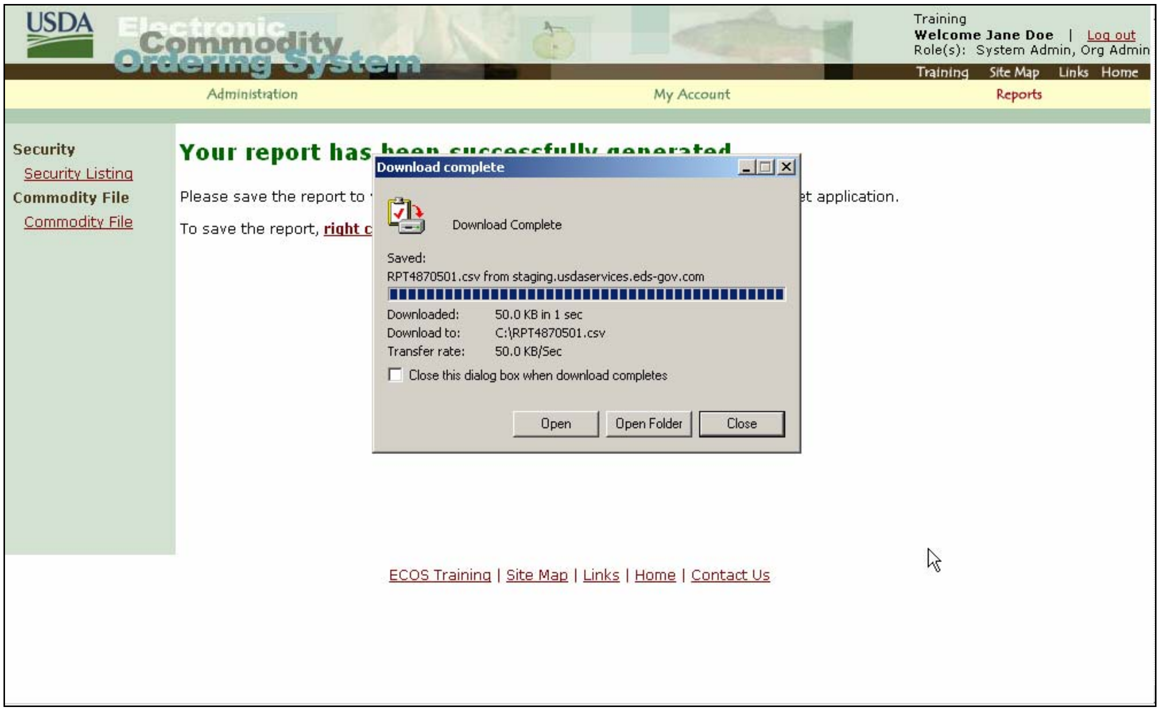


Figure IX–9: CSV - Download Complete Message

The Download Complete dialog box has three buttons:

- **Open**—Opens the report so you can view it in CSV format. Since this file is in spreadsheet format, the data can be customized.
- **Open Folder**—Opens the folder where this file is saved using Windows Explorer.
- **Close**— Closes the Download Complete dialog box while keeping your file saved in the location you indicated.

C. Security Listing Report (Administrators)

The Security Listing report provides user information for one or all of the users who are part of your organization or any of your suborganizations, like regional organizations or plants. Clicking the **Security Listing** link in the Reports list on the Reports page will display the Security Listing page (as shown in *Figure VI–10: Security Listing Report Request*).

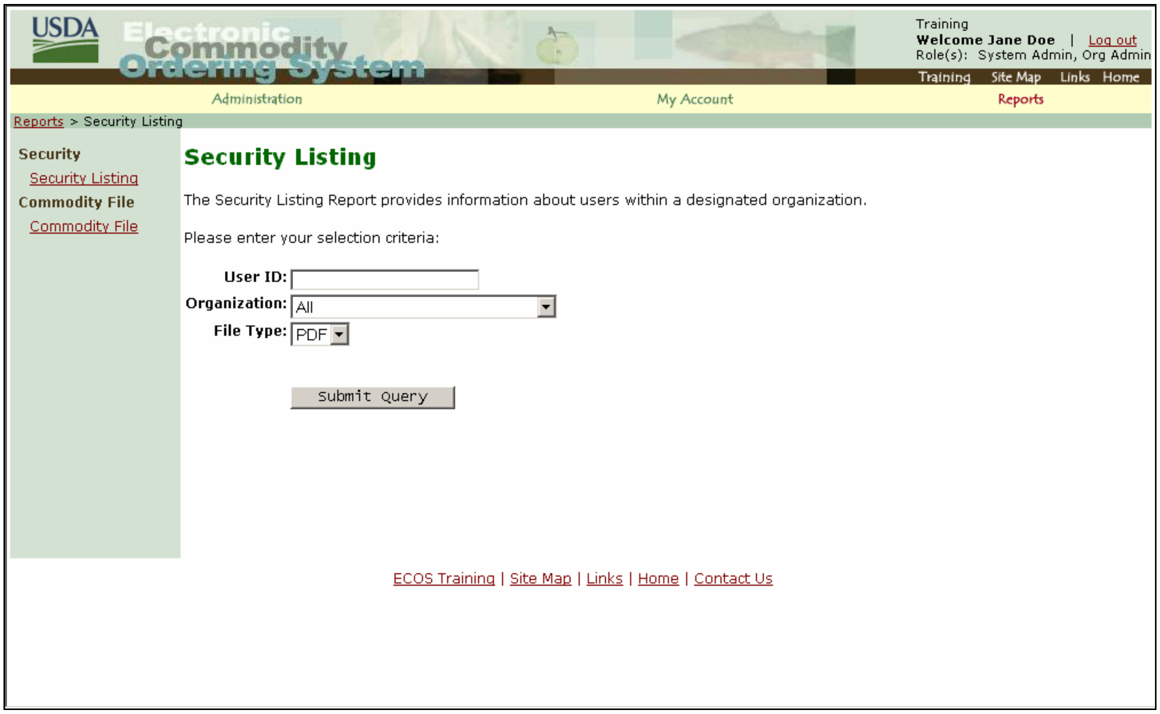


Figure IX–10: Security Listing Report Request

The Security Listing page allows you to enter selection criteria for your report request. This option allows you to narrow your search and avoid irrelevant information. The available selection criteria are described below:

- **User ID**—This field allows you to request a Security Listing report for a single user. It requires you to enter the user's complete User ID in the field provided. When this option is used, the Organization option is overridden. If you enter information in both the User ID and Organization fields and submit your request, the system disregards the information in the Organization field and processes your request based on information entered in the User ID field. There is no default value for this field. When you access the Security Listing page, the User ID field is blank.
- **Organization**—This field allows you to request a Security Listing report by organization. Since it is set up as a selection box, it does not allow you to type organization names into the field. However, if you highlight the field and type a letter in it, the first organization in the selection box that starts with that letter displays. If there are no organizations that begin with the letter you typed, then no change occurs on the page.
- **File Type**—This field allows you to designate the file type for your report (refer to *Section VI.B.2 Enter Selection Criteria*).
- **Commodity File Report**—The Commodity File report provides information on USDA commodities, including pack sizes, truck weights, and most recent purchase costs. Clicking the **Commodity File** link in the Reports list on the Reports page displays the Commodity File Report page (as shown in *Figure V1–11: Commodity File Report Page*).

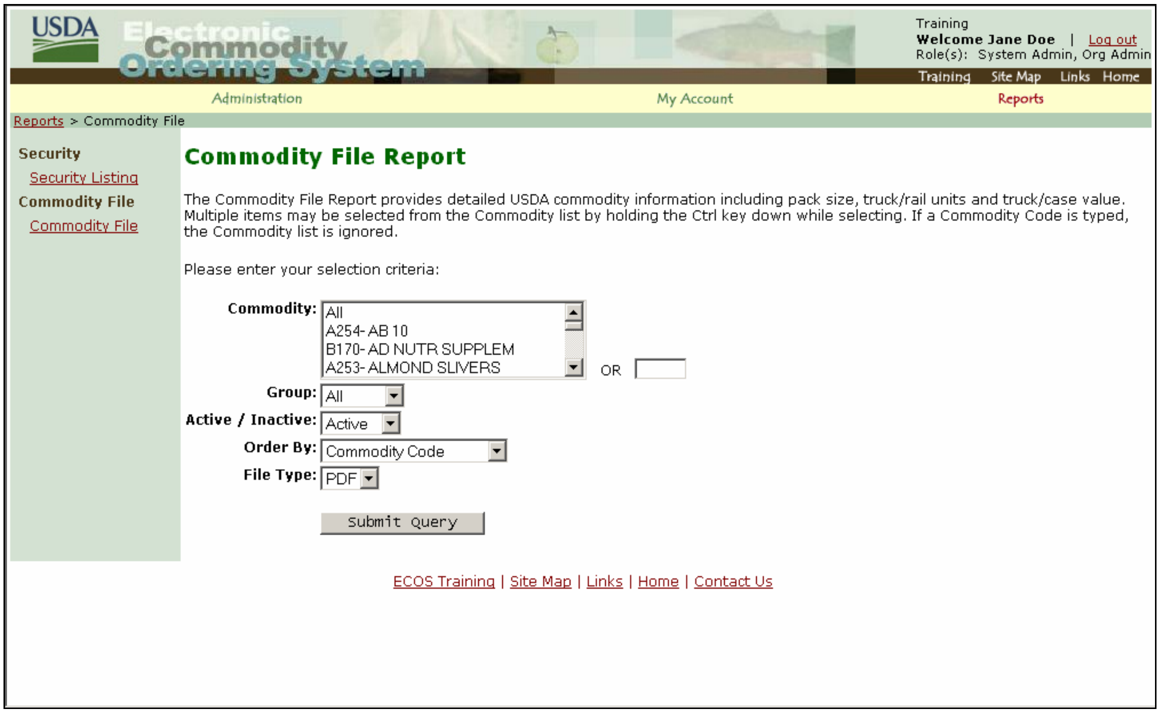


Figure IX–11: Commodity File Report Page

The Commodity File Report page allows you to enter selection criteria for your report request. This option allows you to narrow your search and avoid irrelevant information. The available criteria are described below:

- **Commodity**—This field allows you to request a Commodity File report for a single commodity or multiple commodities. This field provides two methods for inputting information for a report request. The first option is the selection box option. It does not allow you to type commodities into the field. In the selection box, you can select one or many commodities. If you wish to choose one commodity, simply select it. To choose multiple commodities, hold down the "Ctrl" key on your keypad, scroll through the list, and select each of the commodities you want on your report.

  The other option is to use the text box to the right. The text box only permits you to enter four characters in the text field. The text box option overrides the selection box option. If you enter an incorrect commodity code, you receive an error message when you submit your query. The default value for the Commodity field is "All."

- **Group**—This field allows you to request a Commodity File report for Group A, Group B, or both. It is set up as a selection box and does not allow you to type any information in the field. The default value for this field is "All" (both Group A and Group B commodities).

- **Active/Inactive**—This field allows you to choose the status of the commodities that appear in the report. Select the option you want by clicking the **Radio** button to the left of the option. The default option is "Active."

- **Order By**—This field allows you to choose the order in which the commodities appear in the report, whether ordered by commodity code or commodity short title. Select the option you want by clicking the **Radio** button to the left of the option. The default option is "Commodity Code."
- **File Type**—This field allows you to designate the file type for your report (refer to *Section VI.B.2 Enter Selection Criteria*).

D. Shipment Notification Report (Plant/Warehouse)

The Shipment Notifications Received Shipments link is displayed only for Plant/Warehouse users. The Shipment Notification Report provides shipment details for a Delivery Order which can be used to monitor when Delivery Orders have been received, how much quantity was received, and whether there were overages, shortages, or damaged products. When generated, this report is sorted by the Delivery Order Number. Clicking the **Reports** link on the ECOS Toolbar will display the Reports page (as shown in *Figure VI–*12*: Plant/Warehouse Reports*).

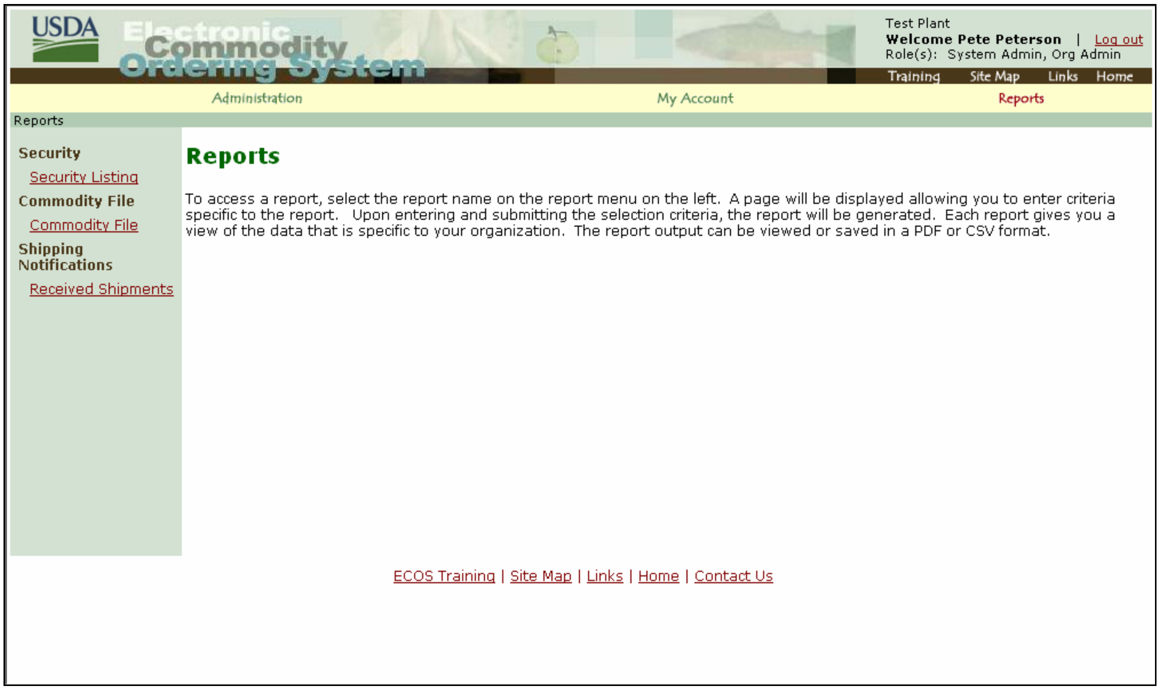


Figure IX–12: Plant/Warehouse Reports

Clicking the **Received Shipments** link in the Reports list on the Reports page will display the Shipment Notification Report (as shown in *Figure VI–13: Shipment Notification Page*).

Figure IX–13: Shipment Notification Report

The Shipment Notification Report page allows you to enter selection criteria for your report request. This option allows you to narrow your search and avoid irrelevant information. The available criteria are described below:

- **Delivery Order** —This field is a text box that allows you to enter the Delivery Order for the delivery notifications.
- **Notice to Deliver Number**—This field is a text box that allows you to enter the Notice to Deliver Number for the delivery notification.
- **Commodity**—This field allows you to request a report for a single commodity or multiple commodities. This field provides two methods for inputting information for a report request. The first option is the selection box option. It does not allow you to type commodities into the field. In the selection box, you can select one or many commodities. If you wish to choose one commodity, simply select it. To choose multiple commodities, hold down the "Ctrl" key on your keypad, scroll through the list, and select each of the commodities you want on your report.

  The other option is to use the text box to the right. The text box only permits you to enter four characters in the text field. The text box option overrides the selection box option. If you enter an incorrect commodity code, you receive an error message when you submit your query. The default value for the Commodity field is "All."

- **Delivery Location—**This field is a drop-down list box that lists Delivery Locations for your plant/warehouse. If you wish to specify a Delivery Location, simply select it from the list. There is no default value; one must be selected.
- **Received Shipment Date Range—**This field consists of two text boxes which allow you to request a report for items within a specified Delivery Period Range. The date format is mm/dd/yyyy for both date range fields.

  File Type—This field allows you to designate the file type for your report (refer to *Section VI.B.2 Enter Selection Criteria*).

E. Delivery Order Status Report (HQ/Plant/Warehouse)

The Delivery Order Status link is displayed only for Plant/Warehouse users. The Delivery Order Status Report provides delivery order information that can be used to monitor the status of delivery orders as they are submitted, placed on an invitation, purchased, and shipped. When generated, this report is sorted first by Round Survey and then by Delivery Year, Commodity Group, and Commodity.

Clicking the **Reports** link on the ECOS Toolbar will display the Reports page (refer to *Figure VI–12: Plant/Warehouse Reports*).

Clicking the **Delivery Order Status** link in the Reports list on the Reports page will display the Delivery Order Status Report (as shown in *Figure VI–14: Delivery Order Status Report Page*).

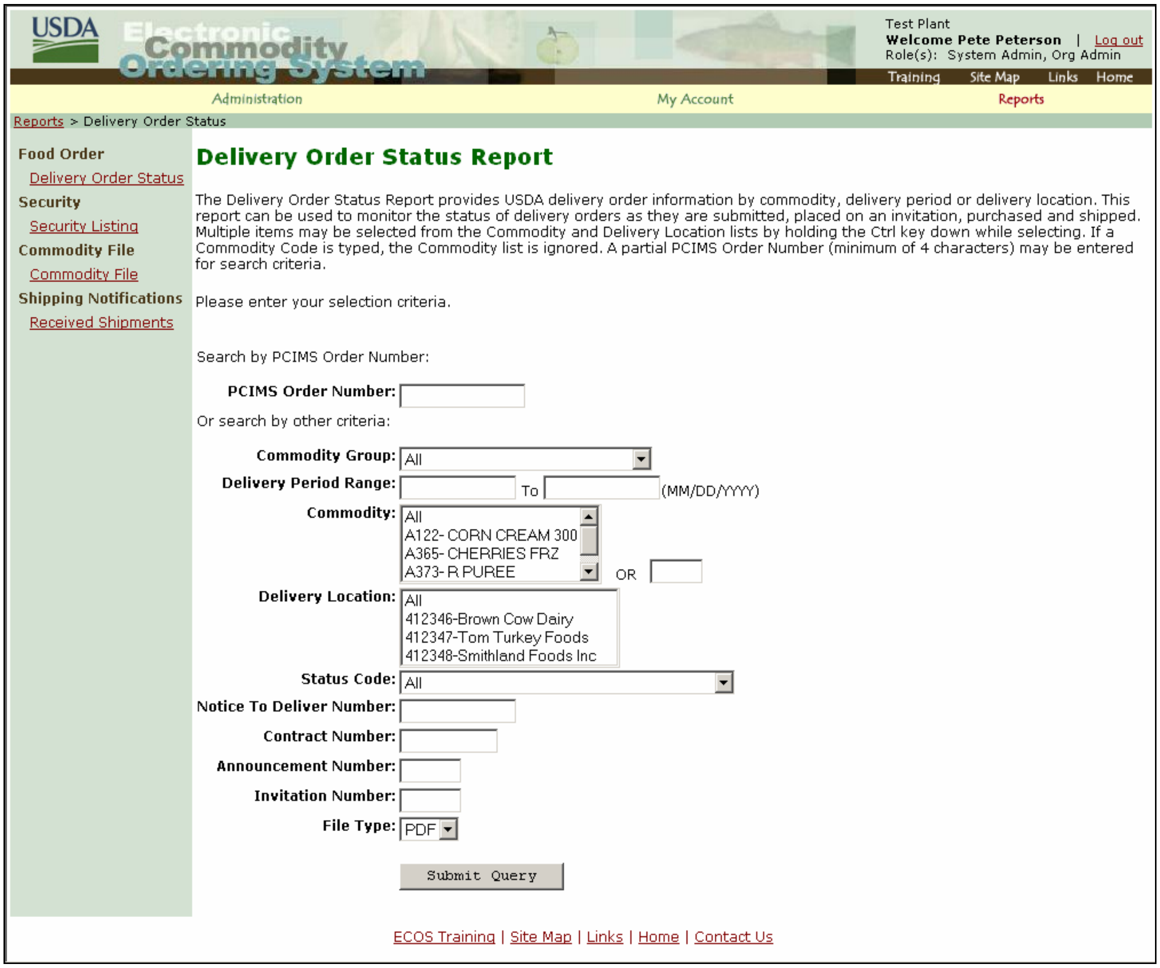


Figure IX–14: Delivery Order Status Report Page

The Delivery Order Status Report page allows you to enter selection criteria for your report request. This option allows you to narrow your search and avoid irrelevant information. The available criteria are described below:

- **PCIMS Delivery Order Number** —This field is a text box that allows you to enter the PCIMS Delivery Order Number.
- **Organization**—This field allows you to request a report by organization. Since this is a selection box, it does not allow you to type organization names into the field. However, if you highlight the field and type a letter in it, the first organization in the selection box that starts with that letter displays. If there are no organizations that begin with the letter you typed, then no change occurs on the page.
- **Commodity Group**—This field is a drop-down list box that allows you to select the Commodity Group of the items that appear. If you wish to specify a Commodity Group, simply select it from the list. The default value for this field is “All.”
- **Delivery Period Range**—This field consists of two text boxes which allow you to request a report for items within a specified Delivery Period Range. ECOS

maintains data as far back as 1999. The date format is mm/dd/yyyy for both date range fields.

- **Commodity—**This field allows you to request a report for a single commodity or multiple commodities. This field provides two methods for inputting information for a report request. The first option is the selection box option. It does not allow you to type commodities into the field. In the selection box, you can select one or many commodities. If you wish to choose one commodity, simply select it. To choose multiple commodities, hold down the "Ctrl" key on your keypad, scroll through the list, and select each of the commodities you want on your report.

  The other option is to use the text box to the right. The text box only permits you to enter four characters in the text field. The text box option overrides the selection box option. If you enter an incorrect commodity code, you receive an error message when you submit your query. The default value for the Commodity field is "All."

- **Delivery Location—**This field is a drop-down list box that lists Delivery Locations for your plant/warehouse. If you wish to specify a Delivery Location, simply select it from the list. There is no default value; one must be selected.

- **Status Code—**This field is a drop-down list box that allows you to select the Status Code of the items that appear. To specify a Status Code, select it from the list. The default value for this field is "All."

- **Notice to Deliver Number—**This field is a text box that allows you to enter the Notice to Deliver Number for the delivery order.

- **Contract Number—**This field is a text box that allows you to enter the Contract Number of the items that appear. To query all commodities for a Contract Number, type in the appropriate Contract Number and select "All" at the top of the Commodity list. There is no default value; one must be entered if you desire to use this field as a selection criterion.

- **Announcement Number**—This field is a text box that allows you to enter the Announcement Number for the delivery order.

- **Invitation Number—**This field is a text box that allows you to enter the Invitation Number.

File Type—This field allows you to designate the file type for your report (refer to *Section VI.B.2 Enter Selection Criteria*

APPENDIX A: HOMEPAGE REFERENCE LINKS

Adjustment Codes and Descriptions	
-blank-	Current year's Entitlement
A	Previous years Entitlement
B	Rejected, damaged, short shipment
E	Redonated amount, charge to Entitlement
F	Redonated amount, not charged to Entitlement
G	Group A Bonus, paid for but not charged to Entitlement
H	Group B Bonus, CCC donated
M	RCCI orders, against school Entitlement
P	Free item, part of food package
S	Group A, paid for but not charged
V	Redonation amount included in bonus report
W	Redonation amount not included in bonus report

Apple Standard Remark Codes and Descriptions	
802	Red Delicious (RD)
803	Golden Delicious (GD)
804	Granny Smith (GS)
805	Winesap (W)
806	Jonathan (J)
807	McIntosh (M)
808	Cortland (C)
809	Stayman (S)
810	Rome Beauty (RB)
811	Ida Red (IR)
812	Newton Pippin
813	York
814	Empire
815	Jonagold (JG)
816	Braeburn (B)
817	Fuji (F)
818	Gala (G)

Delivery Years and Descriptions	
A	2000
C	2001
D	2002
E	2003
F	2004
G	2005
H	2006
I	2007
J	2008
K	2009
L	2010
M	2011
N	2012
O	2013
P	2014
Q	2015
R	2016
S	2017
T	2018
U	2019
V	2020
W	1997
X	1998
Y	1999

Program Codes and Descriptions	
CACF	Child and Adult Care Food Program
SFSP	Summer Food Service Program
CI	Charitable Institutions
CSFP	Commodity Supplemental Food Program
EFAP	Emergency Food Assistance Program
FDIR	Food Distribution Program on Indian Reservations
NPE	Nutrition Program for Elderly
SC	Summer Camps
SCH	Schools
AAA	Area Agencies on the Aging
ENPP	Elderly Nutrition Pilot Program
BOP	Bureaus of Prisons
VAA	Veteran's Affairs
DF	Disaster Feeding

Status Codes and Descriptions	
	Order has not yet been sent to PCIMS
AC	Accepted Orders awaiting PCIMS update
CH	Cancel Holding
CI	Complete and on invitation
CN	All Notice to Delivers have been issued
DF	Delivery Order filled
DX	Deleted from PCIMS
IA	Incomplete and allocated
II	Incomplete on invitation
IN	Incomplete – not on an invitation
ND	Notice to Deliver has been issued
PF	Delivery Order partially filled
PN	Delivery Order filled and ND issued
SH	Delivery Order has been shipped
VA	Valid and allocated Delivery Order
VO	Valid Group B Delivery Order
VP	Valid complete pre-order
VW	Valid Warehouse
RJ	Rejected from PCIMS

Requisition Status Codes and Descriptions	
Placed	Requisition has been placed and can be modified
At SDA* Awaiting Rollup	Requisition has been submitted to SDA and is awaiting rollup
Rolled up/Submitted	Requisition has been rolled up by the SDA and submitted to PCIMS
Declined	Requisition was declined by SDA before submission to USDA

*State Distributing Agency

Group B Section of Public Law		
Program Code	Entitlement	Bonus
CACF	6E	416
SFSP	6E	416
CI	N/A	416
CSFP	17	416
EFAP	104	416
FDIR	4A	416
NPE	311	416
SC	N/A	416
SCH	6E	416
AAA	311	416
ENPP	4A	416
BOP	N/A	416
VAA	N/A	416

APPENDIX B: GLOSSARY

GLOSSARY OF TERMS

CSV	Comma-separated Values
DOD	Department of Defense
ECOS	Electronic Commodity Ordering System
EDS	Electronic Data Systems
FDD	Food Distribution Center
FNS	Food & Nutrition Service
FOIA	Freedom of Information Act
Group A Commodities	Poultry, Livestock, Fruits, and Vegetables
Group B Commodities	Dairy, Peanuts, Oils, and Grains
HTTPS	HyperText Transfer Protocol Secure
Org Admin	Organization Administrator
PCIMS	Processed Commodities Inventory Management System
PDF	Portable Document Format
RA	Recipient Agency
RO	FNS Regional Offices
SA	State Agency
SDA	State Distributing Agency
Sys Admin	System Administrator
URL	Uniform Resource Locator
USA	United States Department of Agriculture
XML	Extensible Markup Language

APPENDIX C: ECOS SA E-MAILS

ECOS SA E-MAILS

E-MAIL DESCRIPTION/CONTENT	RECIPIENTS	SCHEDULE
When a requisition is placed, the requestor receives a summary of the submitted requisition.	RA or SDA user who placed the requisition	Event-driven
When a requisition is modified, the affected RA or SDA Org Admin(s) receive a summary of the modified requisition.	RA or SDA Org Admin(s) of the organization modifying the requisition	Event-driven
If order approval is required on a placed requisition, the requestor receives a notice that it has been submitted for approval.	RA or SDA user who placed the requisition	Event-driven
If order approval is required on a placed requisition, the approver receives a notice that a requisition requires approval.	The RA or SDA approver	Event-driven
If the approver approves the requisition, the requestor receives a notice.	RA or SDA user who placed the requisition	Event-driven
If the approver rejects the requisition, the requestor receives a notice.	RA or SDA user who placed the requisition	Event-driven
When ECOS orders are submitted to PCIMS, the SDA Org Admin(s) receives a consolidated list of their orders indicating they have been submitted to PCIMS for further processing.	SDA Org Admin(s)	M-F 9:45am and 7:45pm
When ECOS receives an update that PCIMS has deleted or cancelled an order, the affected SDA and RA Org Admins receive a consolidated list of the orders.	SDA Org Admin(s) RA Org Admin(s)	The consolidated e-mail job runs M-F after the daily (1pm) and nightly (3am) cycles
When ECOS receives an update that PCIMS has rejected an order, the affected SDA Org Admins receive a consolidated list of the orders, along with an advisement to visit the Rejected Orders page.	SDA Org Admin(s)	The consolidated e-mail job runs M-F after the daily (1pm) and nightly (3am) cycles
When ECOS receives an update that PCIMS has added an order, the SDA Org Admin(s) receives a consolidated list of the new orders.	SDA Org Admin(s)	The consolidated e-mail job runs M-F after the daily (1pm) and nightly (3am) cycles
When ECOS receives an update that PCIMS has changed pertinent information on an order, the SDA Org Admin(s) receives a consolidated list of the affected orders and what the changes were.	SDA Org Admin(s)	The consolidated e-mail job runs M-F after the daily (1pm) and nightly (3am) cycles
When ECOS receives an update that PCIMS has added or changed pertinent information on a survey, the SDA Org Admin(s) receives a consolidated list of the affected surveys and what the changes were.	SDA Org Admin(s)	The consolidated e-mail job runs M-F after the daily (1pm) and nightly (3am) cycles
The E-mail screen is available to USDA and SDA Org Admins from the Administration page. Users may select recipients by organization (of ECOS users who have e-mail addresses on file) or type individual e-mail addresses. Senders will also receive a copy of the e-mail they sent.	Recipients chosen by the user	Event-driven
When shipment notifications are received, the SDA Org Admin(s) receives a consolidated list of their shipment notifications.	SDA Org Admin(s)	The consolidated e-mail job runs nightly (11pm) M-F.